

Destination Analysts, Inc.
November 29, 2006

Findings

Final Report: Fisherman's Wharf Visitor Survey 2006



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I. Methodology & Overview

In the spring of 2006, the Fisherman's Wharf Community Benefit District commissioned Destination Analysts, Inc., a San Francisco based market research firm, to conduct an annual study of visitor traffic in the Fisherman's Wharf area. The research plan developed for this project called for conducting intercept surveys in three one week-long waves during the year. A target of 900 completed surveys (300 in each wave) was set to be collected at five different locations around the Wharf. This report presents the findings of this research.

- **An intercept survey methodology** was selected for this project, as other ways of reaching a reasonable sample of Wharf visitors were prohibitively expensive. Destination Analysts multilingual survey team worked throughout the week at five areas around the Wharf (PIER 39, Pier 43, Pier 45, the Hyde Street Cable Car turnaround and environs, and the Taylor Street Cable Car turnaround.) The survey team randomly sampled foot traffic at these locations, offering a small incentive of gifts provided by local merchants.
- **Destination Analysts field team** consisted of three to six surveyors working at any given time, with proficiency in several languages, including French, Japanese, German and Spanish. In addition, professionally translated surveys were available in Spanish and Japanese to be used in the event that oral communication between the surveyor and respondent was not possible. The general consensus of the field team was that communication in English worked very well. Thirty one of the translated surveys were used during the three survey collection periods.
- **A sample of 923 fully completed surveys** were collected during the research periods. Guided by the research plan, 60 percent of these surveys were collected on weekend days and 40 percent were collected on weekdays. Additionally, 15.4 percent were collected in the morning, 54.1 percent in the afternoon, and 30.5 percent in the evening. The surveys were gathered around the Wharf area in the following percentages: PIER 39 (20.6%), Pier 43 (14.1%), Pier 45 (30.3%), Hyde Street Cable Car turnaround area (20.1%) and the Taylor Street Cable Car turnaround (15.0%).
- **At a 95% confidence level**, the reliability of the top line results presented here can generally be considered to be approximately +/- 5.5 percent.
- **The principal goal of this survey project** was to develop an in-depth understanding of Wharf visitors, including demographic and behavioral characteristics, opinions on the neighborhood's brand attributes and visitor satisfaction metrics. The design of this research is to provide the Fisherman's Wharf Community Benefit District with the information it needs to effectively market the area for tourism, enhance the quality of the visitor experience and improve the neighborhood's overall business climate.

II. Executive Summary

The following is a brief summary of this study's findings:

- **Method of arrival.** Visitors arrive in Fisherman's Wharf by a variety of methods. A large number of visitors utilize a form of public transportation, with nearly 40 percent arriving by cable car, bus or streetcar. Another 18.6 percent arrive on foot. 24.5 percent of visitors arrive by private automobile, the single most cited method. About 5 percent of survey respondents indicated that they were staying in Fisherman's Wharf. A relatively small number of visitors arrive by taxi, ferry/boat or tour bus.
- **Wharf parking & signage.** Of those who arrived by private automobile, nearly half rated parking costs in the Wharf as "Poor" or "Very Poor", divulging this as a potential area of concern. In contrast to parking, nearly 60 percent of visitors rated the signage directing them to and around the Wharf as "Good" or "Very Good", while only 8.2 percent considered it "Poor" or "Very Poor".
- **Primary reason for visiting.** Regardless of season, visitors to the Wharf primarily come to do what they consider sightseeing. Almost 70 percent of survey respondents indicated "Sightseeing" as their primary reason for coming to the Wharf.
- **Food and Fisherman's Wharf.** Wharf visitors are about evenly split on the importance of "Food or Dining" in their overall decision to visit the area. 46.1% consider food "Important" or "Very important" to why they chose to come to the area, whereas 53.9% felt it made little or no impact on their decision to visit. Fisherman's Wharf visitors patronize the neighborhood's dining establishments during their stay; with only 12.1 percent not eating while in the area. The most popular dining option is casual-style restaurants (47.8%), followed by street or seafood vendors, used by 30.4 percent of visitors.
- **Attractions visited.** Visitors take advantage of the many attractions available to them in Fisherman's Wharf. Over 75 percent plan PIER 39 into their itinerary. Specific attractions within PIER 39 also attract tourist traffic, as 54.8 percent of visitors stated they watched or planned to watch the sea lions, and 14.6 percent visited or intended to visit Aquarium of the Bay. Other outdoor shopping complexes are also frequented by visitors, with 39.4 percent making (or planning to make) a trip to Ghirardelli Square and 18.5 percent to The Cannery. Historical attractions draw tourism as well, as 19.6 percent stating they explored (or planned to) Hyde Street Pier, 12.3 percent the USS Pampanito, and 11.0 percent the Maritime Museum. Around 35 percent of Wharf visitors prior to the Alcatraz ferry service move visited Alcatraz; this fell to 26.7 percent in the third wave, which was conducted after the move. However, it appears that visitors are checking out the Wharf's other attractions, as many of these attractions experienced growth in reported visitation.

- **Visitor point of origin.** Fisherman's Wharf is a very popular travel destination for American as well as foreign tourists. American tourists from outside the San Francisco Bay Area make up the nearly half of visitors (46.1%), and over a quarter (26.0%) is of foreign residence. Fisherman's Wharf also attracts San Francisco residents (14.8%) and visitors from surrounding counties (13.1%). Domestic visitors to Fisherman's Wharf come from all across the nation. The top feeder counties are: Los Angeles (3.9%), New York (3.5%) and Sacramento-Stockton-Modesto (3.0%). International visitors also come from a variety of places. Great Britain and Canada represent the two largest markets, responsible for 5.3 percent and 4.0 percent of visitors, respectively. Australia and Germany follow, each country representing 2.7 percent of Wharf visitors.
- **Repeat visitation.** The Fisherman's Wharf area draws both new and returning tourism. More than half (53.2%) have been to the Wharf previously, with the Fall season appearing to attract a greater percentage of repeat visitors. Fisherman's Wharf appears to be doing a good job of providing reasons to visit, as those that have visited previously return with frequency: the mean number of visits is 17.3. Summer visitors are not as likely to have been to the Wharf as many times as those in the shoulder seasons; the average number of times that summer respondents had been to the Wharf was 11.5, compared to 20.7 and 19.0 in the spring and summer.
- **Leisure vs. business travel.** Visitor traffic to the Wharf is primarily due to personal leisure travel rather than business. Over 80 percent of visitors surveyed were in the area as part of a leisure trip or vacation. The other 19 percent were visiting the Wharf as part of a business trip or convention. The shoulder seasons attract a greater percentage of business travelers than the summer.
- **Place of stay.** Visitors to Fisherman's Wharf are largely hotel guests (67.8%). The majority stay in San Francisco: 61.0 percent of Wharf visitors stay in a city hotel, motel or inn. Another 7.8 percent stay in a hotel, motel or inn outside of the city. Fisherman's Wharf also attracts many visitors who stay with family or friends. 8.5 percent of visitors stay in a private residence in San Francisco, while 16.7 percent lodge in a private residence outside the city.
- **Hotel Reservations.** Nearly 60 percent of Wharf visitors staying in a hotel used the Internet to make their reservations. About a third used a third-party travel site such as Expedia, while 24.0 percent booked directly with the hotel. About 15 percent used the services of a travel agent, while 8.6 percent used a telephone reservation service. Another 4.3 percent simply walked into their hotel. About 14 percent utilized "other" methods.
- **Awareness of www.fishermanswharf.org.** Hotel guests were asked if they were aware that Fisherman's Wharf had an official website. Although data on whether they used the website was not captured, about 18 percent stated that they were at least aware of the site.

- **Interest in Wharf travel packages.** Hotel guests were queried about their level of interest in hotel packages offered through the Fisherman's Wharf website. More than a third (36%) said that they would be "Interested" or Very interested", with summer visitors expressing greater interest than the other seasons. The remainder of the group expressed lesser degrees of interest; however it should be noted that this question simply asked about a concept, and did not offer any specific details about what a package might contain and its cost.
- **Group size at Wharf.** Although group sizes varied considerably, the mean (average) number of group members was 3.8 and the median was 2.0, with the greatest percentage of visitors traveling in pairs (41.1%). Compared to those in the spring and fall, summer visitors to Fisherman's Wharf are much more likely to be traveling with others and in larger groups.
- **Children at the Wharf.** Just over 30 percent of Fisherman's Wharf visitors are traveling with children under age 18. With only about 9 percent of San Francisco hotel guests traveling with children on average, this finding supports the notion that Fisherman's Wharf is an attractive destination for visiting families. This is most evident in the summer, when visitors are more than twice as likely to be traveling with kids.
- **Length of stay.** As Fisherman's Wharf visitors take advantage of several of the area's numerous attractions, they accordingly spend a considerable portion of their day in the locale. When asked to estimate the length of time they would stay at the Wharf, the average for all surveys collected was 4 hours 46 minutes. While the mean length of stay was similar in spring and summer (around 5 hours), it was lower in the fall (4 hours 15 minutes). However, given that the average San Francisco hotel guest stay is 3.6 nights, it appears that Fisherman's Wharf is effectively capturing a significant share of visitors' trips.
- **Wharf attributes.** Respondents were asked to rate various attributes of the Wharf area based on a five point scale, where 1 equaled "Very Poor" and 5 equaled "Very Good." In terms of the average ratings given, Fisherman's Wharf again scored highest for its views, walkability, safety, and dining. All of these attributes rated on average "Good" or better. The lowest scoring attributes were seating, selection of retail stores, and cleanliness. Nevertheless, no attributes were rated below "Neutral".
- **Brand attributes.** To develop an understanding of the Fisherman's Wharf brand, the survey asked respondents to share what images or impressions they have of the Fisherman's Wharf area. The questions were posed in an unaided format, simply asking which first came to mind when thinking about the Wharf--without assistance from the surveyor. Food (particularly seafood) and proximity to the bay were confirmed as the strongest brand associations. In fact, one might say that seafood and seawater for the most part encapsulate the Fisherman's Wharf brand.

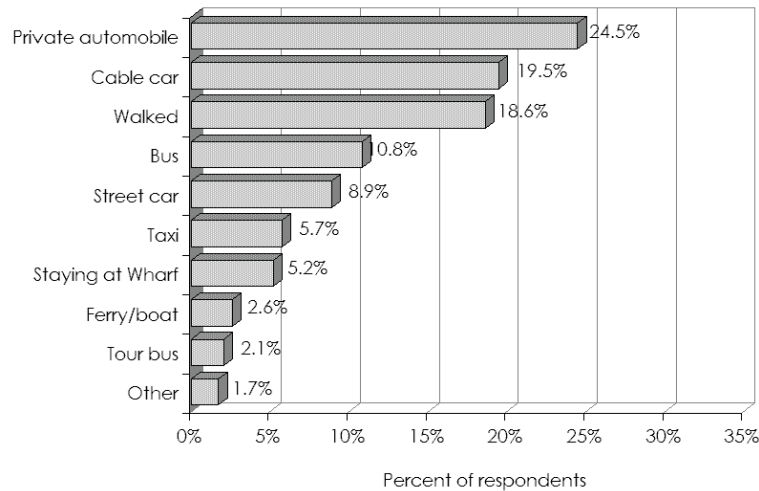
- **Most liked attributes.** Respondents were asked what they liked most about Fisherman's Wharf. The answers given were many and diverse, yet the top three "most liked" remained the same across the three waves of research. The most frequently cited Fisherman's Wharf attribute liked by visitors was "views and scenery," mentioned by 26.9 percent of respondents. The Wharf's general "atmosphere and ambiance" was most liked by 20.1 percent of visitors. "Food-dining-restaurants" and/or "seafood" were mentioned by at least one-in-five respondents (17.3). Summer visitors appear to appreciate the shopping in the Wharf a bit more than spring and fall visitors; "shopping" was mentioned by 13.4 percent in this research wave versus 6.0 percent and 5.7 percent in the first and third waves, respectively.
- **Most disliked attributes.** Respondents were asked an open-ended question about what they most dislike about Fisherman's Wharf. The most common answer given in the first and third research waves was "There is nothing I dislike" (27.9% and 27.3%, respectively). In the second wave (summer), however, 36.5 percent of those surveyed stated that the Wharf being "crowded" and having "too many people (or) tourists" was what they disliked most. Nevertheless, almost one in five summer visitors surveyed specifically said that there is nothing that they dislike about the Wharf.
- **Likelihood of return.** Given the overall positive reception demonstrated by survey respondents, as expected, the overwhelming majority of visitors to Fisherman's Wharf say that they would be "Likely" (33.4%) or "Very Likely" to return (53.1%). Of note, during the last two research waves, there was a significant increase in the number of respondents who indicated they were "Very Likely" to return. Only a handful of survey respondents indicated that they would be "Unlikely" (4.4%) or "Very Unlikely" (0.7%) to return.
- **Visitor satisfaction.** Satisfaction with the visitor experience at Fisherman's Wharf is high, with the clear majority of respondents stating they were "Satisfied" (58.0%) or "Extremely satisfied" (35.6%). Satisfaction with the Wharf experience was high through the year, but reached its apogee in the fall wave, with 44.3 percent of respondents saying they were "Extremely satisfied" with their experience.
- **Planning horizons.** One of the goals of this survey is to develop an understanding of when visitors make the decision to visit Fisherman's Wharf. This research shows that visitation to the Wharf is planned largely in advance. In total, over 77 percent of visitors said that they had planned their visit at some point before the day they were surveyed. Only about 22 percent of survey respondents made the decision to visit the Wharf on that same day.
- **Age.** Fisherman's Wharf appears to attract a younger visitor set, with 42 percent being under 35 years of age. The average age of survey respondents is 39.4 years old; in comparison, the average age of San Francisco hotel guests is 46.

- **Formal education.** Wharf visitors are a highly educated group, with nearly 63 percent having at least graduated from college. By way of comparison, according to the U.S. Bureau of the Census, approximately 27 percent of American adults 25 or older have attained a college degree.
- **Income.** Fisherman's Wharf visitors appear to be fairly affluent. The annual household income of respondents averaged \$82,111 over the year. In the third wave of research, the annual household income of respondents reached \$87,338, significantly higher than in the first two waves.
- **Marital status and gender.** Approximately half (49.4%) of survey respondents are married, while 40.5 percent are single. About 20 percent have children under age 18. Summer visitors are more likely to be married and have children under age 18. Fisherman's Wharf visitors are fairly evenly split by gender, with a slight tilt toward male visitors.
- **Ethnicity.** The survey used a standard set of questions to ask respondents to describe their ethnic identity. First, they were asked if they consider themselves to be of Latino or Hispanic descent, then they are asked which best describes their ethnicity. This technique is used as a Latino/Hispanic persons can, of course, be of diverse ethnic backgrounds, and might also consider themselves to be in one of the groups detailed in the next question (ethnicity). Similar across all research waves, 16.3 percent of survey respondents consider themselves to be of Latino or Hispanic descent. The ethnic profile of Wharf visitors collected in this research shows that a majority (67.9%) of respondents self-identify as Caucasian. Asian-Pacific Islanders accounted for 10.5 percent of surveys collected and Black/African-Americans 7.7 percent. 2.9 percent of surveyed individuals identified as Native American, Aleut, or Eskimo, while 11.0 percent said they were of an "other" ethnicity.
- **Employment status.** Fisherman's Wharf visitors are largely employed. Over 60 percent of respondents said that they were employed full-time. About 13 percent are working part-time, and 10 percent are self-employed.
- **Spending at Fisherman's Wharf.** Respondents were asked to estimate the amount (in total) that they would spend while at the Wharf on the day they were surveyed. The average Wharf visitor reports spending \$109.60 during their visit. This research also shows that summer visitors spend (or intend to spend) more than those in the spring and fall shoulder seasons. The average summer visitor estimated that they spent (or would spend) \$124.33 during the day, compared to the \$102.64 and \$103.70 estimated by spring and fall visitors, respectively. The median daily spending for all surveys collected in this project was \$80.
- **Likely activities in future.** A question was added to the second and third waves of the survey that asked respondents if they were likely to purchase several types of items and/or activities in the next six months. The table below shows the results. Those most frequently mentioned were "Use a credit card" (75.6%), "Buy bottled water" (74.6%) and "Take digital photos."

III. Method of Arrival at Fisherman's Wharf

Visitors arrive in Fisherman's Wharf by a variety of methods. A large number of visitors utilize a form of public transportation, with nearly 40 percent arriving by cable car, bus or streetcar. Another 18.6 percent arrive on foot. 24.5 percent of visitors arrive by private automobile, the single most cited method. About 5 percent of survey respondents indicated that they were staying in Fisherman's Wharf. A relatively small number of visitors arrive by taxi, ferry/boat or tour bus.

Question 1: How did you arrive at Fisherman's Wharf today?



Base: 924 completed surveys (Wave 1 = 320, Wave 2 = 303 and Wave 3 = 300)

Detail by Survey Wave

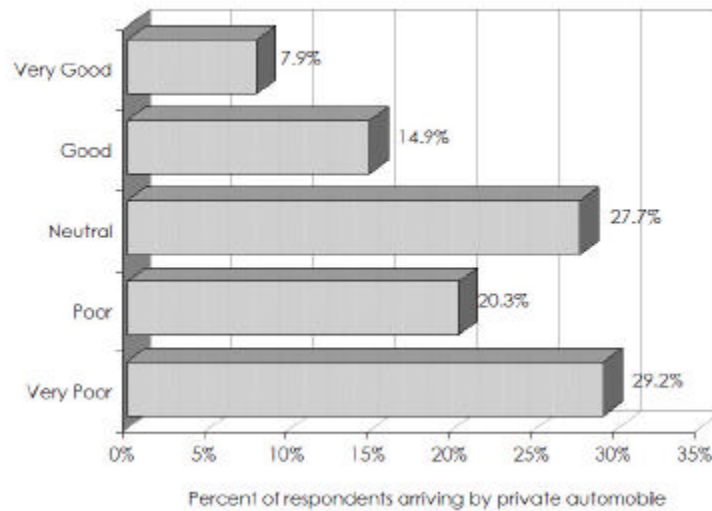
	Wave 1	Wave 2	Wave 3
Private Automobile	28.1%	26.4%	18.7%
Cable Car	15.3%	17.8%	25.7%
Walked	18.1%	15.2%	22.7%
Bus	11.9%	12.2%	8.3%
Street car	10.0%	6.6%	10.0%
Staying at Wharf	3.8%	6.3%	5.0%
Taxi	6.6%	5.6%	5.7%
Ferry Boat	2.5%	3.6%	1.3%
Tour bus	2.2%	3.6%	0.3%
Other	1.6%	2.3%	1.3%

IV. Cost of Parking at Fisherman's Wharf

Respondents who arrived by private automobile were asked to rate the cost of parking. Nearly half rated parking costs in the Wharf as "Poor" or "Very Poor", divulging this as a potential area of concern. Another 27.7 percent were neutral. Only about 23 percent felt the cost of parking was "Good" or "Very Good".

Question 2A: Please rate the cost of parking at Fisherman's Wharf

Detail by Survey Wave



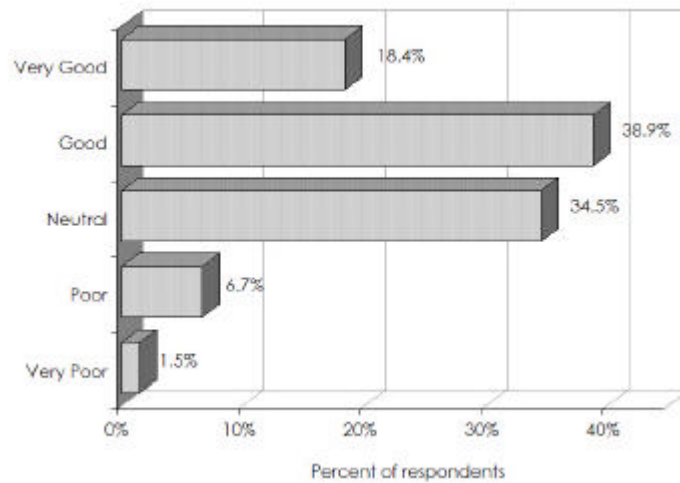
	Wave 1	Wave 2	Wave 3
Very good	12.0%	6.3%	3.6%
Good	18.1%	18.8%	5.5%
Neutral	22.9%	29.7%	32.7%
Poor	16.9%	21.9%	23.6%
Very poor	30.1%	23.4%	34.5%

Base: 202 completed surveys (Wave 1 = 83, Wave 2 = 64 and Wave 3 = 55)

V. Street Signage at Fisherman's Wharf

In steep contrast to parking, nearly 60 percent of visitors rated the signage directing them to and around the Wharf as “Good” or “Very Good”, while only 8.2 percent considered it “Poor” or “Very Poor”. The remainder was neutral.

Question 2B: Please rate the signage at Fisherman's Wharf



Detail by Survey Wave

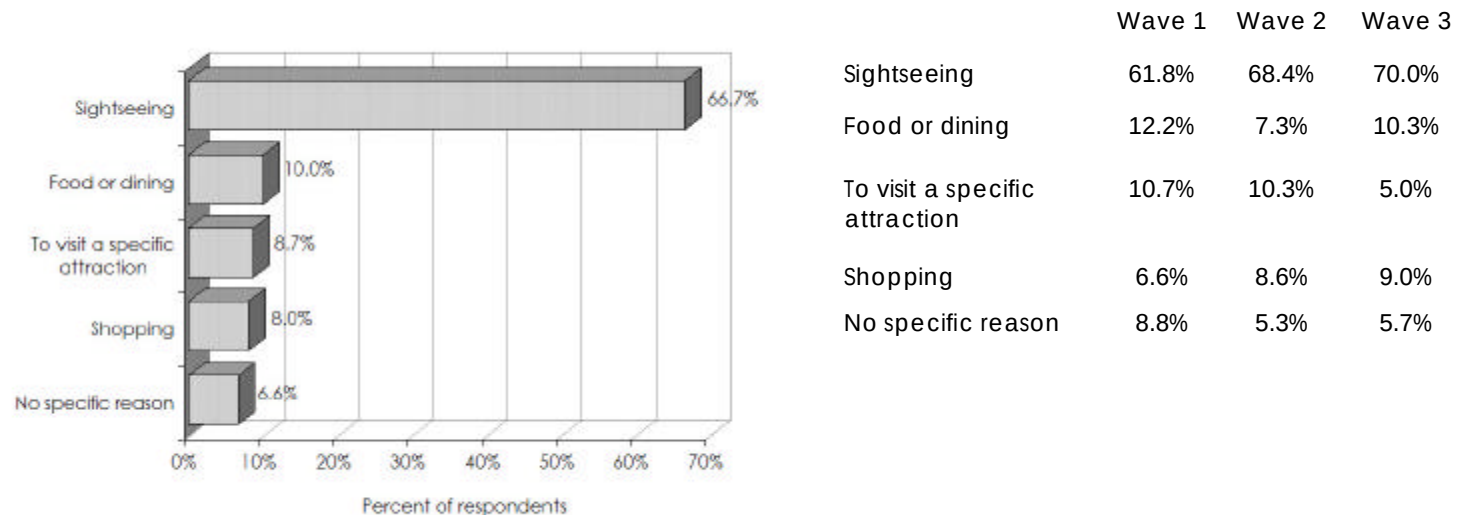
	Wave 1	Wave 2	Wave 3
Very good	17.6%	16.5%	21.5%
Good	35.1%	42.8%	39.3%
Neutral	38.0%	34.4%	30.7%
Poor	8.3%	4.6%	6.7%
Very poor	1.0%	1.8%	1.9%

Base: 869 completed surveys (Wave 1 = 313, Wave 2 = 285 and Wave 3 = 270)

VI. Primary Reason for Visiting Fisherman's Wharf

Regardless of season, visitors to the Wharf primarily come to do what they consider sightseeing. Almost 70 percent of survey respondents indicated "Sightseeing" as their primary reason for coming to the Wharf. Again, "sightseeing" may encompass many of the myriad of activities available to visitors in the Wharf, from checking out street performances to taking in the bay views. "Food or dining" was the next most commonly cited primary reason for visit, with 10.0 percent coming to the Wharf specifically to eat. 8.0 percent come to the Wharf for the shopping, while 6.6 percent have "no specific reason". Interestingly, the number of people in the third research wave who indicated "to visit a specific attraction" was half (5.0%) of what it was in the first two waves (about 10 percent). Although the sub-sample is not large enough to draw a firm conclusion, this finding—coupled with the 10-point drop in the number of respondents going to or planning to go to Alcatraz in the third research wave (Section IX)—may be indicative of a shift in visitor composition due to the Alcatraz ferry service move.

Question 3: What was your primary reason for visiting Fisherman's Wharf today? Detail by Survey Wave

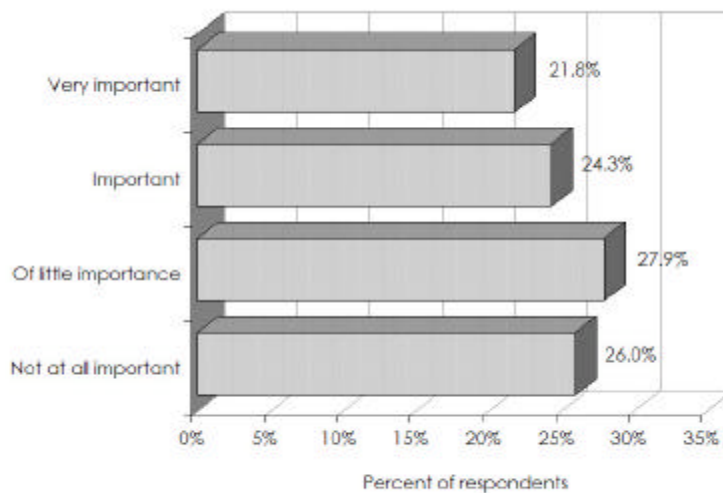


Base: 921 completed surveys (Wave 1 = 319, Wave 2 = 301 and Wave 3 = 300)

VII. Importance of “Food or Dining” to Decision to Visit

Although only 10 percent cite dining as their primary reason for visiting, Wharf visitors are about evenly split on the importance of “Food or Dining” in their overall decision to visit the area. 46.1% consider food “Important” or “Very important” to why they chose to come to the area, whereas 53.9% felt it made little or no impact on their decision to visit.

Question 4: How important was “food or dining” in your decision to visit Fisherman’s Wharf today? Detail by Survey Wave



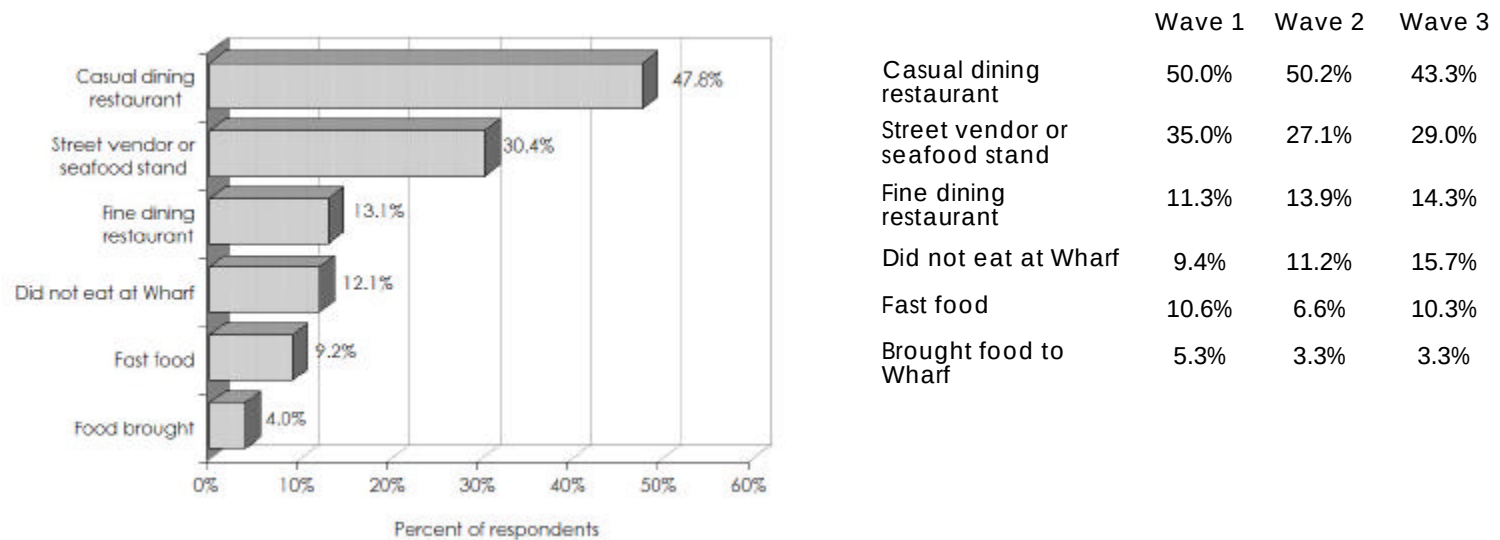
	Wave 1	Wave 2	Wave 3
Very important	26.2%	18.5%	20.5%
Important	21.7%	25.5%	25.8%
Of little importance	28.1%	30.1%	25.5%
Not at all important	24.0%	25.8%	28.2%

Base: 913 completed surveys (Wave 1 = 313, Wave 2 = 302 and Wave 3 = 298)

VIII. Dining Alternatives Used at Fisherman's Wharf

Whether or not they felt dining was important to their decision to visit, Fisherman's Wharf visitors patronize the neighborhood's dining establishments during their stay, with only 12.1 percent not eating while there. The most popular dining option is casual-style restaurants (47.8%), followed by street or seafood vendors, used by 30.4 percent of visitors.

Question 5: Which dining alternatives did you (or do you plan to) use on your visit to the Wharf today? Detail by Survey Wave

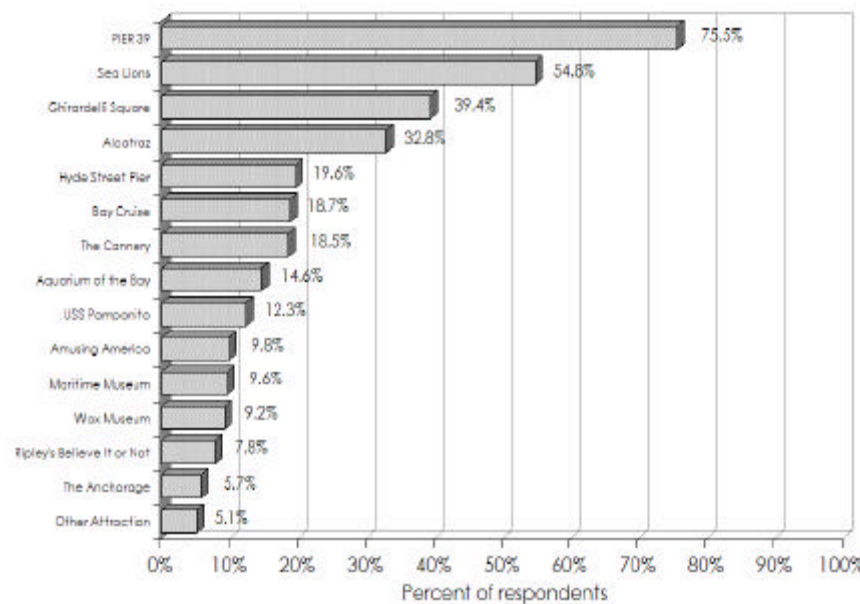


Base: 924 completed surveys (Wave 1 = 320, Wave 2 = 303 and Wave 3 = 300)

IX. Attractions Visited at Fisherman's Wharf

Visitors take advantage of the many attractions available to them in Fisherman's Wharf. Over 75 percent plan PIER 39 into their itinerary. Specific attractions within PIER 39 also attract tourist traffic, as 54.8 percent of visitors stated they watched or planned to watch the sea lions, and 14.6 percent visited or intended to visit Aquarium of the Bay. Other outdoor shopping complexes are also frequented by visitors, with 39.4 percent making (or planning to make) a trip to Ghirardelli Square and 18.5 percent to The Cannery. Historical attractions draw tourism as well, as 19.6 percent stated they explored (or planned to) Hyde Street Pier, 12.3 percent the USS Pampanito, and 11.0 percent the Maritime Museum. Around 35 percent of Wharf visitors prior to the Alcatraz ferry service move visited Alcatraz; this fell to 26.7 percent in the third wave, which was conducted after the move. However, it appears that visitors are checking out the Wharf's other attractions, as many of these attractions experienced growth in reported visitation.

Question 6: Which Fisherman's Wharf attractions did you visit (or do you plan to visit) today? Detail by Survey Wave

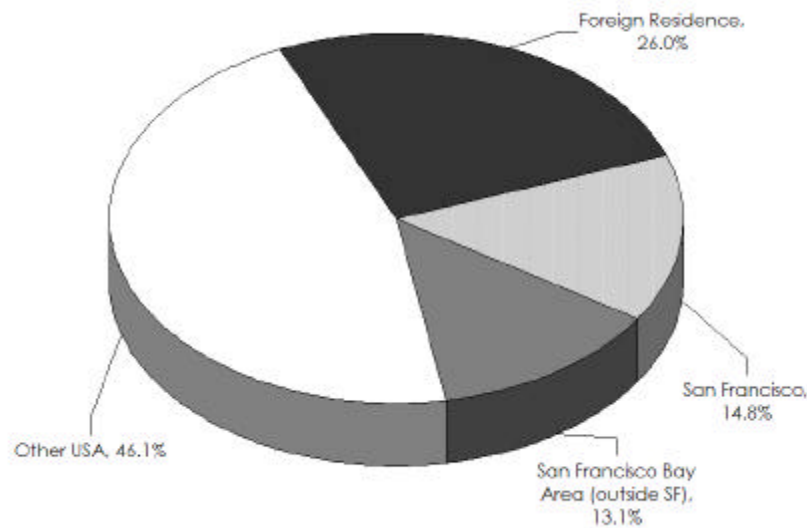


	Wave 1	Wave 2	Wave 3
PIER 39	77.8%	73.3%	75.7%
Sea Lions	60.3%	43.6%	60.3%
Ghirardelli Square	38.8%	41.9%	37.7%
Alcatraz	36.3%	35.3%	26.7%
Hyde Street Pier	17.2%	17.5%	24.3%
Bay Cruise	14.1%	18.5%	24.0%
The Cannery	17.8%	16.8%	21.0%
Aquarium of the Bay	16.6%	12.9%	14.3%
USS Pampanito	12.5%	10.2%	14.3%
Amusing America	11.3%	3.3%	15.0%
Maritime Museum	12.2%	5.6%	11.0%
Wax Museum	9.1%	9.6%	9.0%
Ripley's Believe It or Not	6.9%	8.9%	7.7%
The Anchorage	5.3%	2.6%	9.3%
Other Attraction	2.8%	10.6%	2.0%

Base: 924 completed surveys (Wave 1 = 320, Wave 2 = 303 and Wave 3 = 300)

X. Place of Residence

Fisherman's Wharf is a very popular travel destination for American as well as foreign tourists. American tourists from outside the San Francisco Bay Area make up nearly half of visitors (46.1%), and over a quarter (26.0%) is of foreign residence. Fisherman's Wharf also attracts San Francisco residents (14.8%) and visitors from surrounding counties (13.1%).



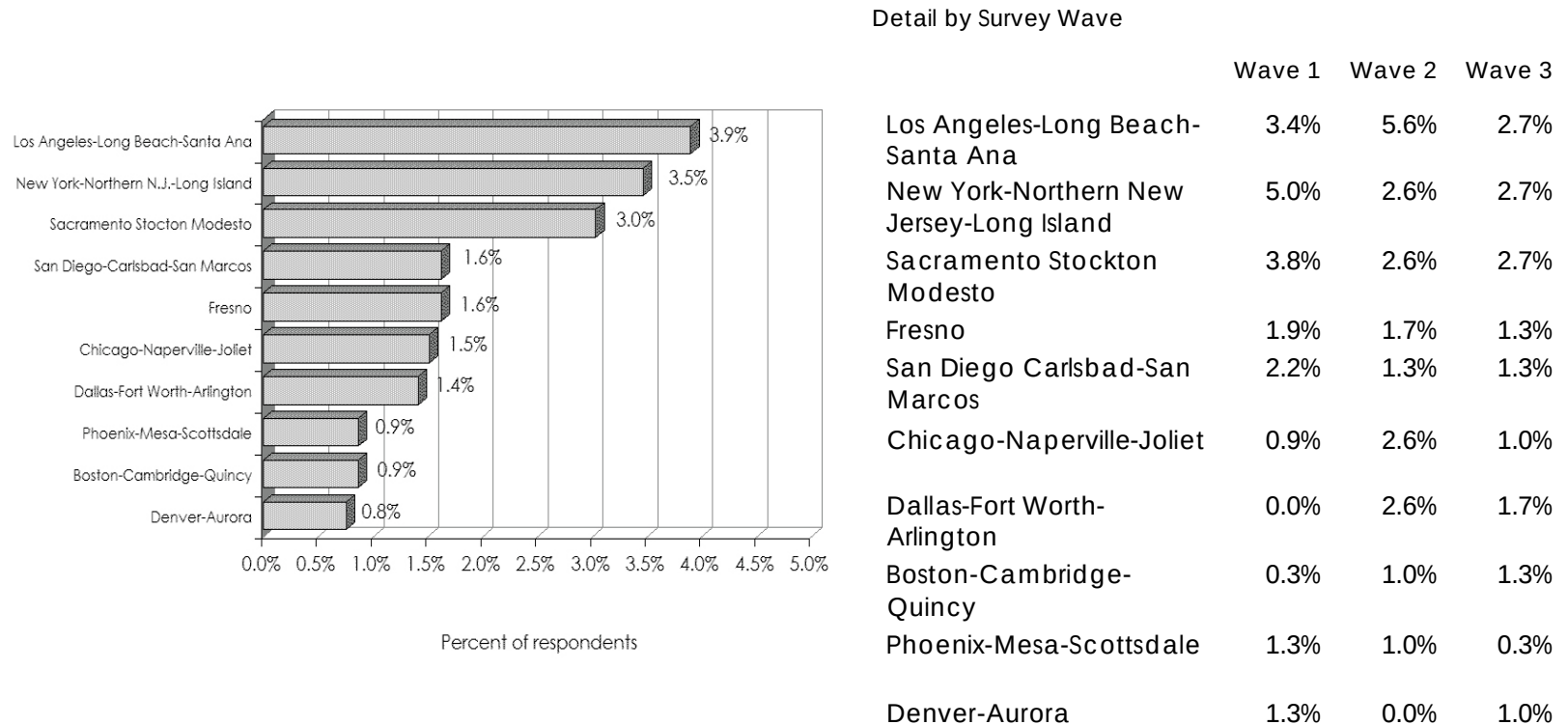
Base: 919 completed surveys (Wave 1 = 317, Wave 2 = 303 and Wave 3 = 299)

Detail by Survey Wave

	Wave 1	Wave 2	Wave 3
Other USA	41.0%	52.1%	45.5%
Foreign residence	28.4%	21.5%	28.1%
San Francisco	16.7%	14.2%	13.4%
San Francisco Bay Area	13.9%	12.2%	13.0%

XI. Domestic Feeder Markets

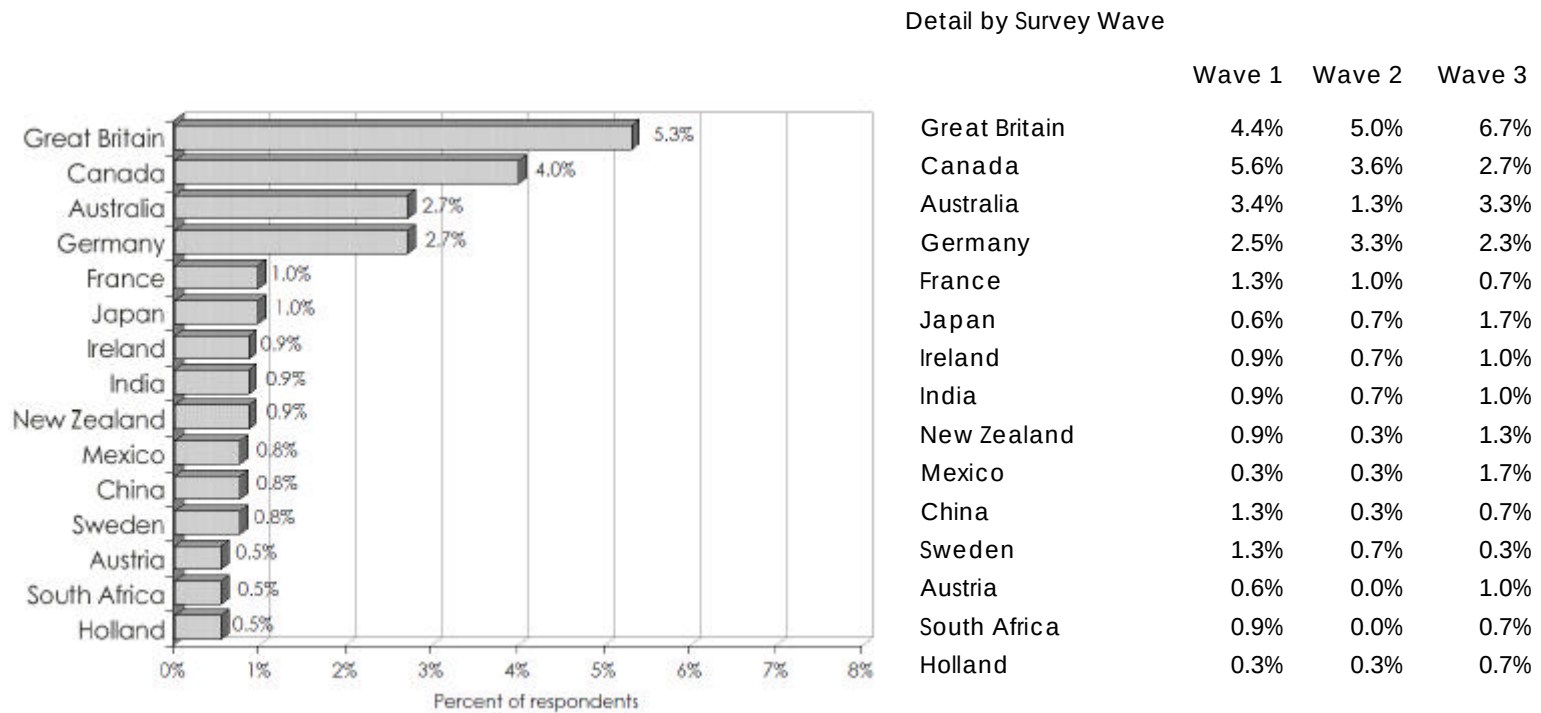
Domestic visitors to Fisherman's Wharf come from all across the nation. The top feeder markets (defined by Metropolitan Statistical Area) are shown in the table below. The top feeder MSAs are: Los Angeles (3.9%), New York (3.5%) and Sacramento-Stockton-Modesto (3.0%).



Base: 924 completed surveys (Wave 1 = 319, Wave 2 = 303 and Wave 3 = 301)

XII. Top Foreign Feeder Markets

Foreign visitors to Fisherman's Wharf come from around the globe. The top feeder markets for foreign visitors are presented on the table below. Great Britain and Canada represent the two largest markets, responsible for 5.3 percent and 4.0 percent of visitors, respectively. Australia and Germany follow, each country representing 2.7 percent of Wharf visitors.



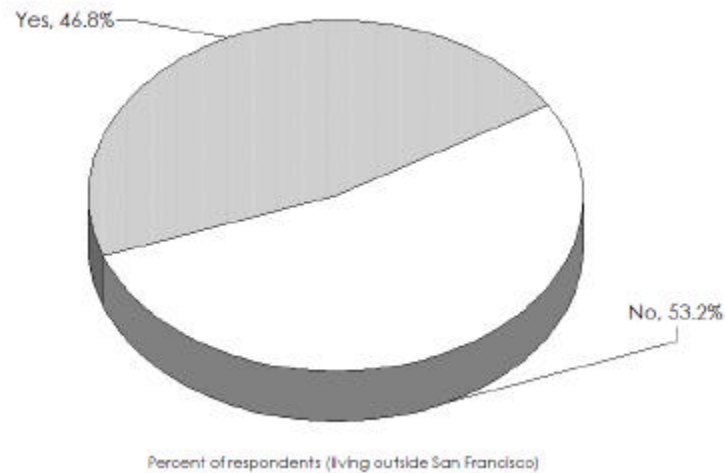
Base: 924 completed surveys (Wave 1 = 320, Wave 2 = 303 and Wave 3 = 300)

XIII. First Time Visitors to Fisherman’s Wharf

The Fisherman’s Wharf area draws both new and returning tourism. More than half (53.2%) have been to the Wharf previously, with the Fall season appearing to attract a greater percentage of repeat visitors.

Question 8: Is this your first visit to Fisherman’s Wharf?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Yes	50.4%	46.7%	43.3%
No	49.6%	53.3%	56.7%

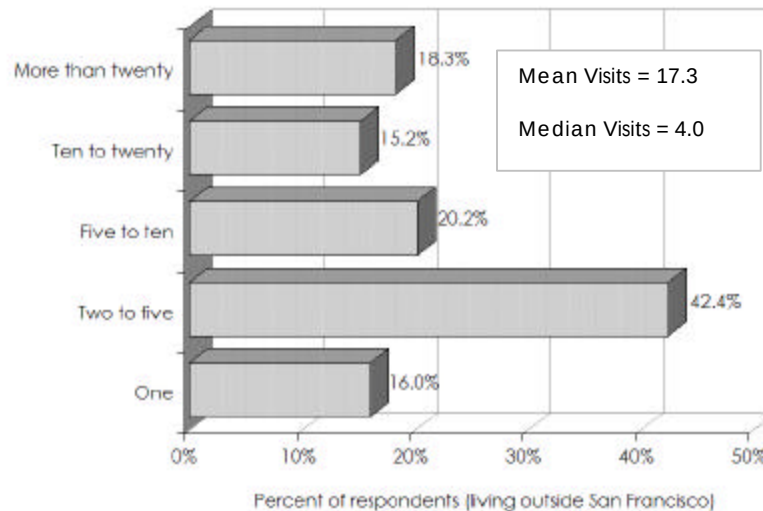
Base: 786 completed surveys (Wave 1 = 266, Wave 2 = 259 and Wave 3 = 261)

XIV. Previous Visits to Fisherman's Wharf

During the survey, if a respondent had previously been to the Wharf, they were asked how many times previously they had visited. Fisherman's Wharf appears to be doing a good job of providing reasons to visit, as those that have visited previously return with frequency: the mean number of visits is 17.3. Summer visitors are not as likely to have been to the Wharf as many times as those in the shoulder seasons; the average number of times that summer respondents had been to the Wharf was 11.5, compared to 20.7 and 19.0 in the spring and summer.

Question 8A: How many times have you been to Fisherman's Wharf before today?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
More than twenty	19.7%	14.3%	20.9%
Ten to twenty	17.2%	15.1%	13.4%
Five to ten	23.0%	20.6%	17.2%
Two to five	34.4%	42.9%	49.3%
One	18.0%	15.1%	14.9%
Mean	20.7	11.5	19.0
Median	5	4	4

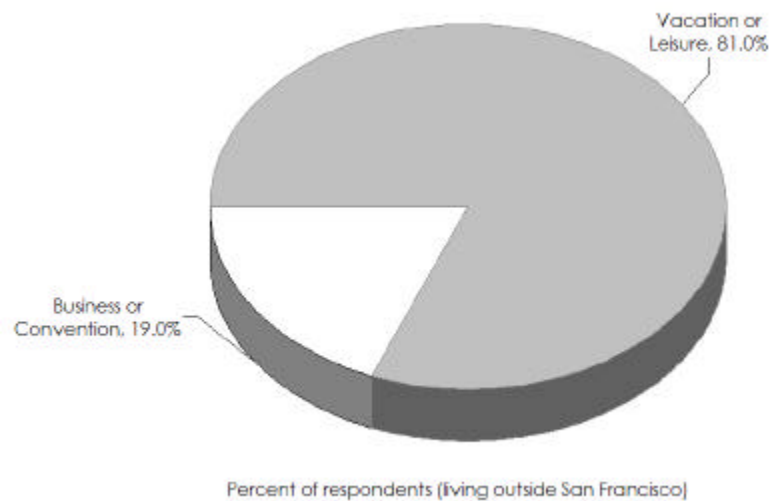
Base: 382 completed surveys (Wave 1 = 122, Wave 2 = 126 and Wave 3 = 134)

XV. Main Purpose of Trip

Visitor traffic to the Wharf is primarily due to personal leisure travel rather than business. Over 80 percent of visitors surveyed were in the area as part of a leisure trip or vacation. The other 19 percent were visiting the Wharf as part of a business trip or convention. The shoulder seasons attract a greater percentage of business travelers than the summer.

Question 9: Which best describes the purpose of your trip?

Detail by Survey Wave



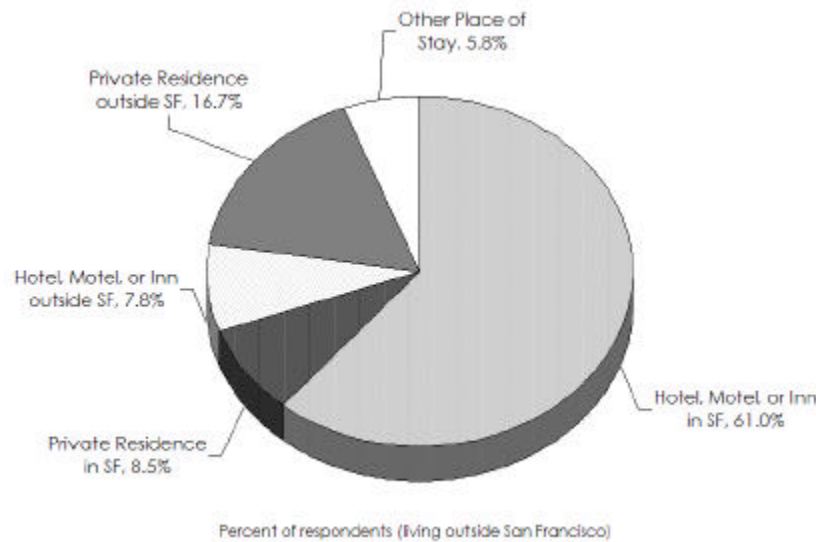
	Wave 1	Wave 2	Wave 3
Vacation or leisure	75.1%	91.1%	77.1%
Business or convention	24.9%	8.9%	22.9%

Base: 785 completed surveys (Wave 1 = 265, Wave 2 = 257 and Wave 3 = 262)

XVI. Place of Stay

Visitors to Fisherman's Wharf are largely hotel guests (67.8%). The majority stay in San Francisco: 61.0 percent of Wharf visitors stay in a city hotel, motel or inn. Another 7.8 percent stay in a hotel, motel or inn outside of the city. Fisherman's Wharf also attracts many visitors who stay with family or friends. 8.5 percent of visitors stay in a private residence in San Francisco, while 16.7 percent lodge in a private residence outside the city.

Question 10: Where are you currently staying?



Detail by Survey Wave

	Wave 1	Wave 2	Wave 3
Hotel, Motel, or Inn in SF	61.3%	58.6%	63.4%
Private Residence in SF	7.9%	9.6%	7.6%
Hotel, Motel, or Inn outside SF	9.0%	7.7%	6.9%
Private Residence outside SF	15.4%	17.2%	17.6%
Other Place of Stay	6.4%	6.5%	4.6%

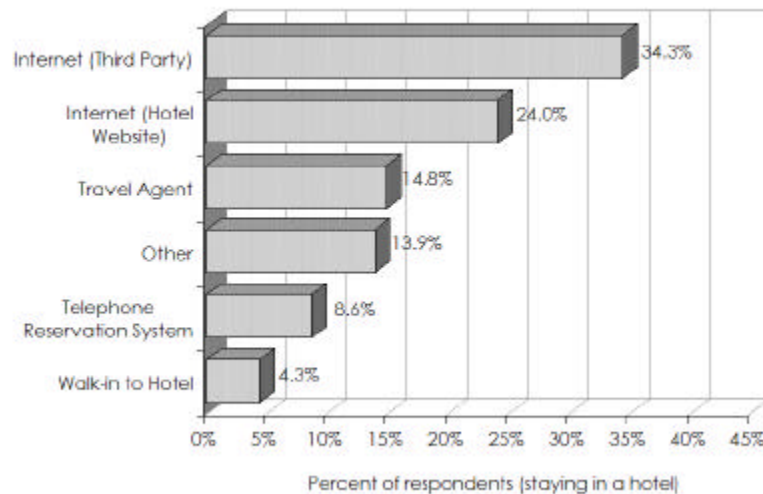
Base: 790 completed surveys (Wave 1 = 266, Wave 2 = 261 and Wave 3 = 262)

XVII. How Hotel Reservations Were Made

Nearly 60 percent of Wharf visitors staying in a hotel used the Internet to make their reservations. About a third used a third-party travel site such as Expedia, while 24.0 percent booked directly with the hotel. About 15 percent used the services of a travel agent, while 8.6 percent used a telephone reservation service. Another 4.3 percent simply walked into their hotel. About 14 percent utilized “other” methods.

Question 11: How did you make your hotel reservation?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Internet (Third Party)	37.1%	39.3%	26.8%
Internet (Hotel Website)	22.6%	23.2%	26.3%
Travel Agent	12.9%	16.1%	15.6%
Other	11.8%	7.7%	21.8%
Telephone Reservation System	10.2%	8.3%	7.3%
Walk-in to Hotel	5.4%	5.4%	2.2%

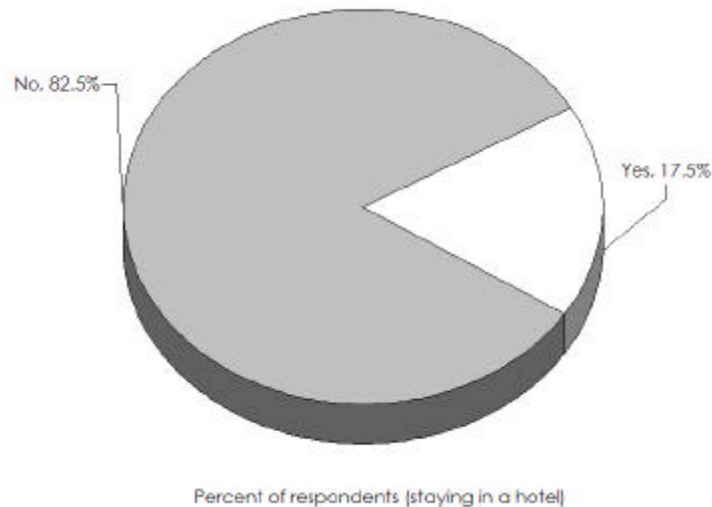
Base: 533 completed surveys (Wave 1 = 186, Wave 2 = 168 and Wave 3 =179)

XVIII. Awareness of FWMA Website

Hotel guests were asked if they were aware that Fisherman's Wharf had an official website. Although data on whether they used the website was not captured, about 18 percent stated that they were at least aware of the site.

Question 12: Were you aware that Fisherman's Wharf has an official website?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Yes	18.0%	17.5%	16.9%
No	82.0%	82.5%	83.1%

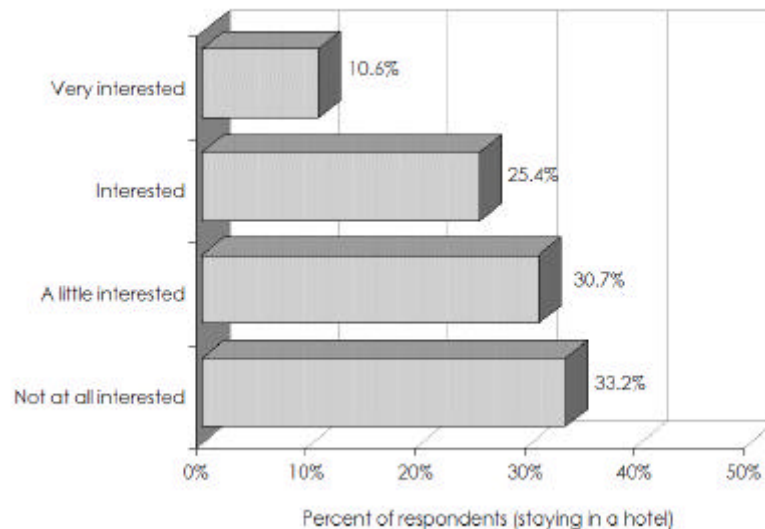
Base: 526 completed surveys (Wave 1 = 183, Wave 2 = 166 and Wave 3 = 177)

XIX. Interest in Fisherman's Wharf Travel Packages

Hotel guests were queried about their level of interest in hotel packages offered through the Fisherman's Wharf website. More than a third (36%) said that they would be "Interested" or Very interested", with summer visitors expressing greater interest than the other seasons. The remainder of the group expressed lesser degrees of interest; however it should be noted that this question simply asked about a concept, and did not offer any specific details about what a package might contain and its cost.

Question 13: If the official Fisherman's Wharf website offered travel packages (for example, a stay at a Wharf hotel and tickets to attractions or events), in general, how interesting would this be to you?

Detail by Survey Wave



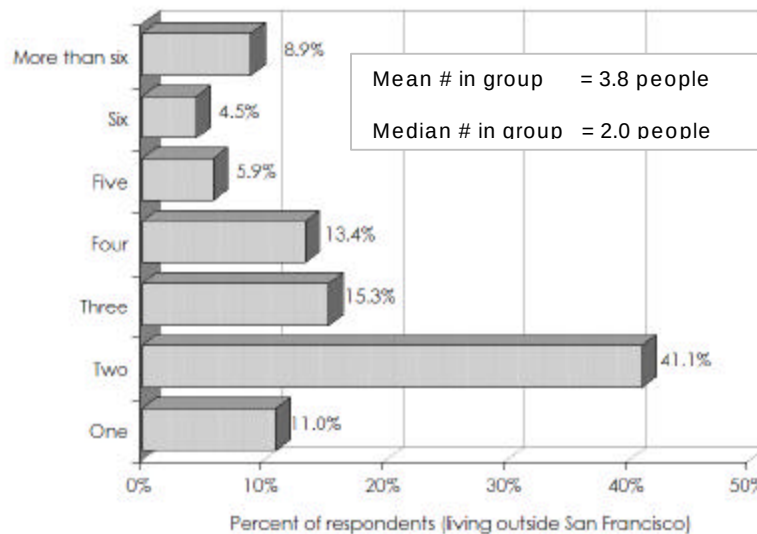
	Wave 1	Wave 2	Wave 3
Very interested	10.2%	15.8%	6.3%
Interested	23.1%	26.1%	27.3%
A little interested	28.0%	35.8%	29.0%
Not at all interested	38.7%	22.4%	37.5%

Base: 527 completed surveys (Wave 1 = 186, Wave 2 = 165 and Wave 3 = 176)

XX. Group Size

Survey respondents were asked how many people were in their group. Although group sizes varied considerably, the mean (average) number of group members was 3.8 and the median was 2.0, with the greatest percentage of visitors traveling in pairs (41.1%). Compared to those in the spring and fall, summer visitors to Fisherman's Wharf are much more likely to be traveling with others and in larger groups. This may be attributed to a greater likelihood of summer visitors traveling with children (Section XXI).

Question 14: How many people are in your group today?



Detail by Survey Wave

	Wave 1	Wave 2	Wave 3
More than six	10.6%	10.9%	5.0%
Six	4.9%	4.3%	4.2%
Five	5.7%	7.8%	4.2%
Four	10.9%	18.3%	11.1%
Three	12.5%	22.2%	11.5%
Two	41.9%	30.7%	50.6%
One	13.6%	5.8%	13.4%
Mean	3.8	4.1	3.5
Median	2.0	3.0	2.0

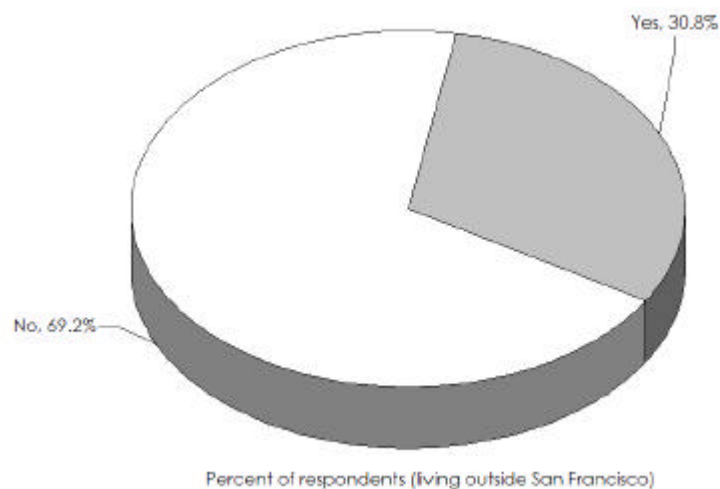
Base: 784 completed surveys (Wave 1 = 265, Wave 2 = 257 and Wave 3 = 261)

XXI. Children in Group

Just over 30 percent of Fisherman's Wharf visitors are traveling with children under age 18. With only about 9 percent of San Francisco hotel guests traveling with children¹ on average, this finding supports the notion that Fisherman's Wharf is an attractive destination for visiting families. This is most evident in the summer, when visitors are more than twice as likely to be traveling with kids.

Question 15: Do you have any children under 18 years of age with you today?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Yes	27.0%	44.9%	20.6%
No	73.0%	55.1%	79.4%

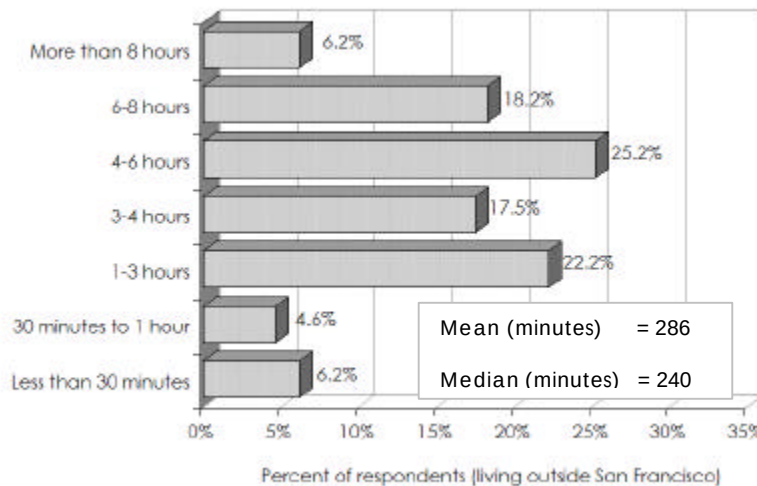
Base: 776 completed surveys (Wave 1 = 263, Wave 2 = 256 and Wave 3 = 257)

¹ San Francisco Hotel Guest Study 2004

XXII. Length of Stay at Fisherman's Wharf

As Fisherman's Wharf visitors take advantage of several of the area's numerous attractions (Section IX), they accordingly spend a considerable portion of their day in the locale. When asked to estimate the length of time they would stay at the Wharf, the average for all surveys collected was 4 hours 46 minutes. While the mean length of stay was similar in spring and summer (around 5 hours), it was lower in the fall (4 hours 15 minutes). However, given that the average San Francisco hotel guest stay is 3.6 nights², it appears that Fisherman's Wharf is effectively capturing a significant share of visitors' trips.

Question 16: How long did you (or will you) stay at Fisherman's Wharf today?



Detail by Survey Wave

	Wave 1	Wave 2	Wave 3
More than 8 hours	3.9%	4.0%	10.6%
6-8 hours	21.5%	29.1%	4.3%
4-6 hours	28.1%	22.3%	25.2%
3-4 hours	15.6%	19.1%	17.7%
1-3 hours	21.9%	20.3%	24.4%
30 minutes to 1 hour	3.9%	2.8%	7.1%
Less than 30 minutes	5.1%	2.4%	10.6%
Mean (minutes)	300	313	255
Median (minutes)	291	300	240

Base: 762 completed surveys (Wave 1 = , Wave 2 = and Wave 3 =)

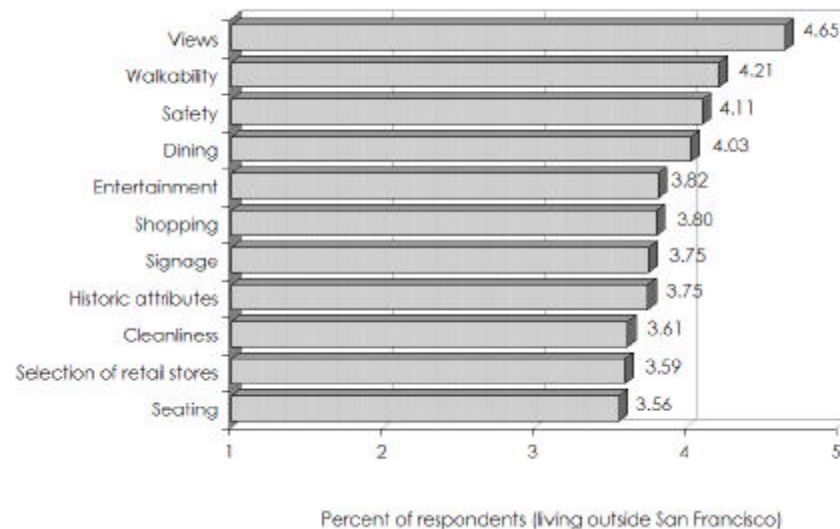
² San Francisco Hotel Guest Study 2004

XXIII. Ratings of Fisherman's Wharf Attributes

Respondents were asked to rate various attributes of the Wharf area based on a five point scale, where 1 equaled "Very Poor" and 5 equaled "Very Good." An overview of the results of this attribute rating exercise is presented below. In terms of the average ratings given, Fisherman's Wharf again scored highest for its views, walkability, safety, and dining. All of these attributes rated on average "Good" or better. The lowest scoring attributes were seating, selection of retail stores, and cleanliness. Nevertheless, no attributes were rated below "Neutral".

Question 17: Please use this scale to rate each aspect of Fisherman's Wharf (MEAN SCORES)

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Views	4.65	4.69	4.61
Walkability	4.26	4.07	4.31
Safety	4.15	4.14	4.03
Dining	4.06	3.95	4.09
Entertainment	3.90	3.83	3.71
Shopping	3.75	3.79	3.86
Signage	3.65	3.82	3.80
Historic attributes	3.88	3.62	3.73
Cleanliness	3.74	3.58	3.52
Selection of retail stores	3.61	3.56	3.59
Seating	3.59	3.68	3.41

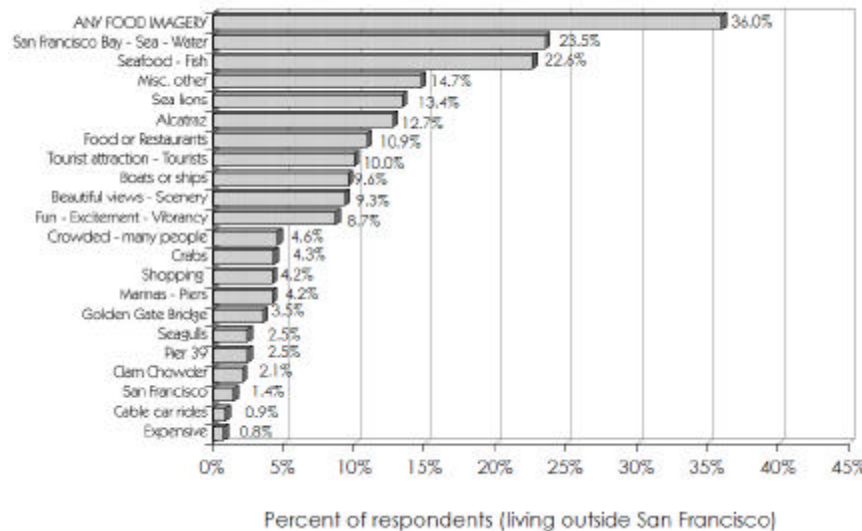
Base: 773 completed surveys (Wave 1 = 263, Wave 2 = 253 and Wave 3 = 256)

XXIV. Impressions of Fisherman's Wharf

To develop an understanding of the Fisherman's Wharf brand, the survey asked respondents to share what images or impressions they have of the Fisherman's Wharf area. The questions were posed in an unaided format, simply asking which first came to mind when thinking about the Wharf--without assistance from the surveyor. Food (particularly seafood) and proximity to the bay were confirmed as the strongest brand associations. In fact, one might say that seafood and seawater for the most part encapsulate the Fisherman's Wharf brand.

Question 18: When you think about Fisherman's Wharf, what are the images or impressions that come to mind?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
ANY FOOD IMAGERY	44.1%	26.6%	37.2%
San Francisco Bay - Sea - Water	20.7%	26.2%	23.7%
Seafood - Fish	28.1%	16.7%	22.9%
Misc. other	17.2%	12.3%	14.6%
Sea lions	15.6%	8.7%	15.8%
Alcatraz	17.2%	10.3%	10.7%
Food or Restaurants	13.3%	8.3%	11.1%
Tourist attraction	8.6%	10.3%	11.1%
Boats or ships	10.2%	7.9%	10.7%
Beautiful views - Scenery	6.6%	11.5%	9.9%
Fun - Excitement	3.1%	10.7%	12.3%
Crowded	5.5%	4.8%	3.6%
Crabs	3.5%	3.2%	6.3%
Shopping	2.3%	5.6%	4.7%
Marinas - Piers	6.6%	3.2%	2.8%
Golden Gate Bridge	3.5%	3.6%	3.6%
Seagulls	3.9%	1.6%	2.0%
Pier 39	2.0%	3.2%	2.4%
Clam Chowder	3.1%	1.2%	2.0%
San Francisco	1.6%	1.2%	1.6%
Cable car rides	0.4%	0.8%	1.6%
Expensive	0.8%	0.4%	1.2%

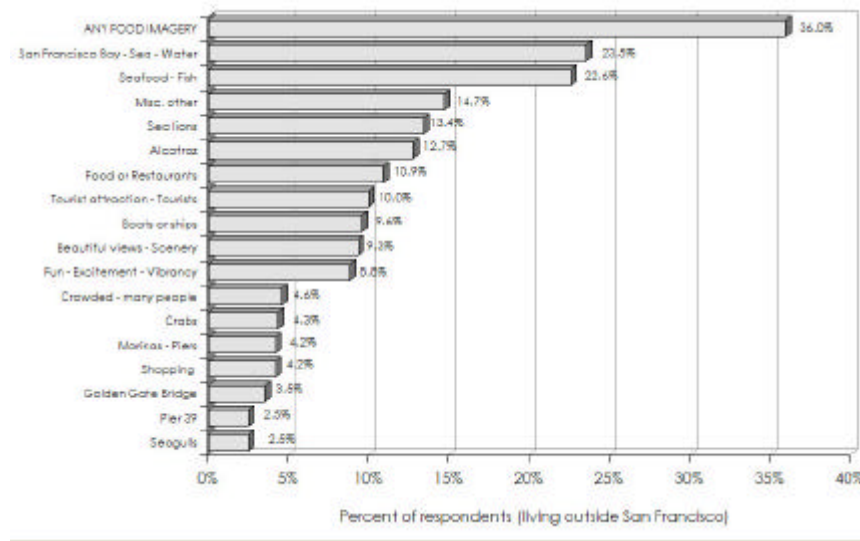
Base: 761 completed surveys (Wave 1 = 256, Wave 2 = 252 and Wave 3 = 253)

XXV. Things Most Liked about Fisherman's Wharf

Respondents were asked what they liked most about Fisherman's Wharf. The answers given were many and diverse, yet the top three "most liked" remained the same across the three waves of research. The most frequently cited Fisherman's Wharf attribute liked by visitors was "views and scenery," mentioned by 26.9 percent of respondents. The Wharf's general "atmosphere and ambiance" was most liked by 20.1 percent of visitors. "Food-dining-restaurants" and/or "seafood" were mentioned by at least one-in-five respondents (17.3). Summer visitors appear to appreciate the shopping in the Wharf a bit more than spring and fall visitors; "shopping" was mentioned by 13.4 percent in this research wave versus 6.0 percent and 5.7 percent in the first and third waves, respectively.

Question 19: What do you like most about Fisherman's Wharf?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Views - Scenery	26.9%	30.9%	25.6%
Ambiance - Atmosphere	20.1%	14.6%	23.6%
Food - Restaurants	17.3%	17.5%	15.9%
Misc. other	13.7%	7.7%	13.4%
Proximity to the Bay	10.0%	10.6%	11.4%
Sea Lions	12.0%	4.1%	11.0%
Sightseeing activities - Entertainment	9.2%	7.3%	9.3%
Shopping	6.0%	13.4%	5.7%
Variety - Diversity	3.6%	9.8%	8.1%
People Watching	6.0%	7.7%	6.1%
Seafood	5.2%	4.1%	7.3%
Alcatraz	4.4%	1.6%	2.8%
Walkable	2.4%	2.4%	4.1%
Boats	2.0%	1.2%	2.4%
Historical attributes	1.6%	2.8%	1.2%
PIER 39	1.6%	1.2%	1.2%
Chocolate	2.0%	0.0%	1.6%
Clean	1.6%	1.2%	0.4%

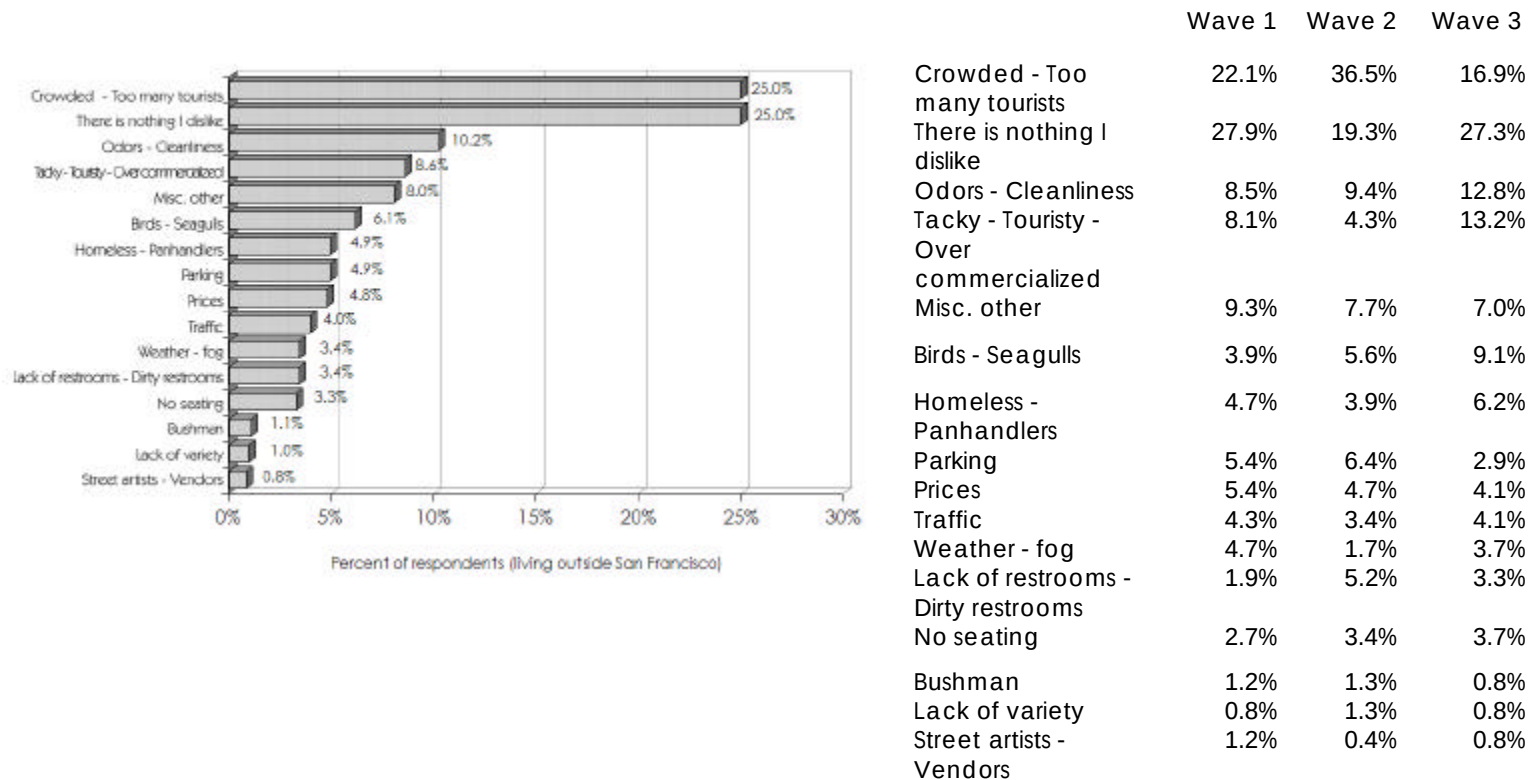
Base: 741 completed surveys (Wave 1 = 249, Wave 2 = 246 and Wave 3 = 246)

XXVI. Things Most Disliked about Fisherman's Wharf

Respondents were asked an open-ended question about what they most dislike about Fisherman's Wharf. The most common answer given in the first and third research waves was "There is nothing I dislike" (27.9% and 27.3%, respectively). In the second wave (summer), however, 36.5 percent of those surveyed stated that the Wharf being "crowded" and having "too many people (or) tourists" was what they disliked most. Nevertheless, almost one in five summer visitors surveyed specifically said that there is nothing that they dislike about the Wharf.

Question 20: What do you dislike most about Fisherman's Wharf?

Detail by Survey Wave



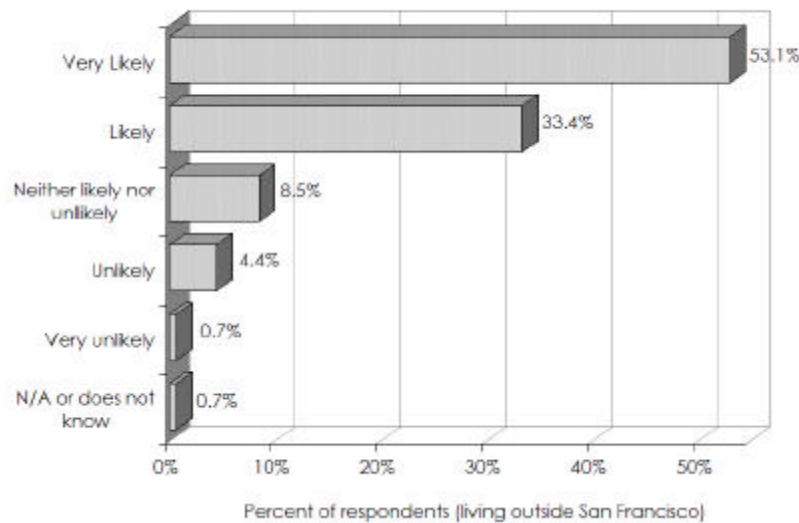
Base: 733 completed surveys (Wave 1 = 258, Wave 2 = 233 and Wave 3 = 242)

XXVII. Likelihood of Return to Fisherman's Wharf

Given the continued overall positive reception demonstrated by survey respondents, as expected, the overwhelming majority of visitors to Fisherman's Wharf say that they would be "Likely" (33.4%) or "Very Likely" to return (53.1%). Of note, during the last two research waves, there was a significant increase in the number of respondents who indicated they were "Very Likely" to return. Only a handful of survey respondents indicated that they would be "Unlikely" (4.4%) or "Very Unlikely" (0.7%) to return.

Question 21: How likely would you be to return to Fisherman's Wharf again?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Very Likely	46.5%	53.0%	59.7%
Likely	39.5%	30.3%	30.2%
Neither likely nor unlikely	8.5%	10.8%	6.2%
Unlikely	4.7%	4.8%	3.9%
Very unlikely	0.8%	1.2%	0.0%
N/A or does not know	0.8%	1.2%	0.0%

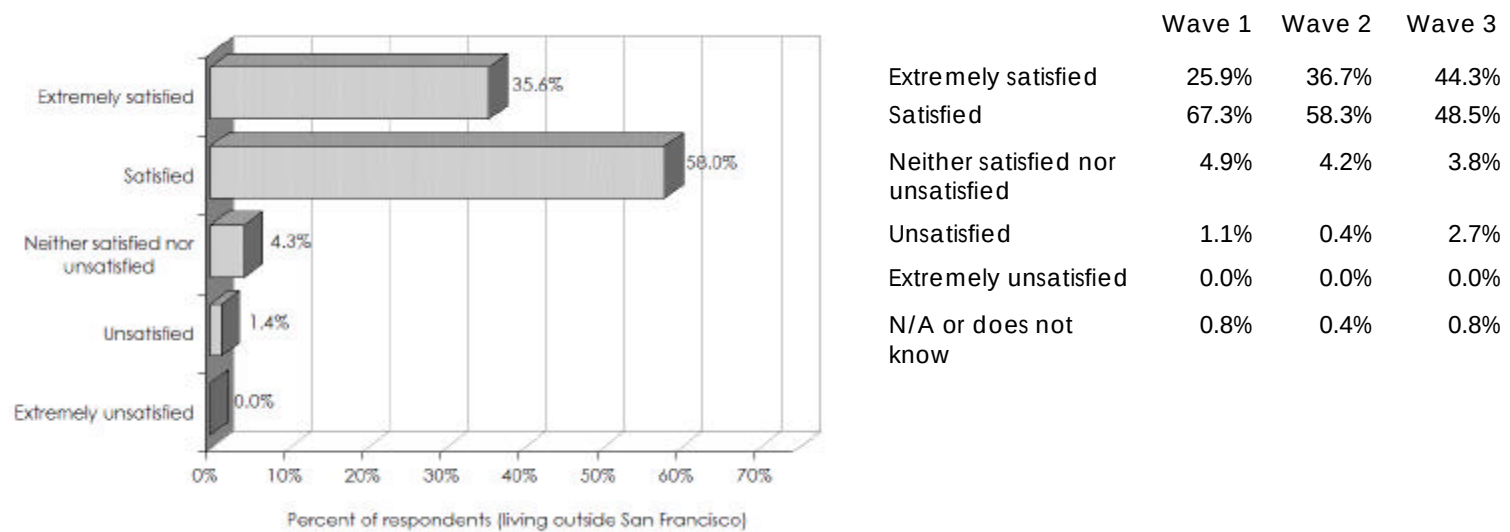
Base: 767 completed surveys (Wave 1 = 258, Wave 2 = 251 and Wave 3 = 258)

XXVIII. Satisfaction with Fisherman's Wharf Visit

Satisfaction with the visitor experience at Fisherman's Wharf is high, with the clear majority of respondents stating they were "Satisfied" (58.0%) or "Extremely satisfied" (35.6%). Satisfaction with the Wharf experience was high through the year, but reached its apogee in the fall wave, with 44.3 percent of respondents saying they were "Extremely satisfied" with their experience.

Question 22: Thinking about all aspects of your visit to Fisherman's Wharf today, how satisfied are you with your visit?

Detail by Survey Wave



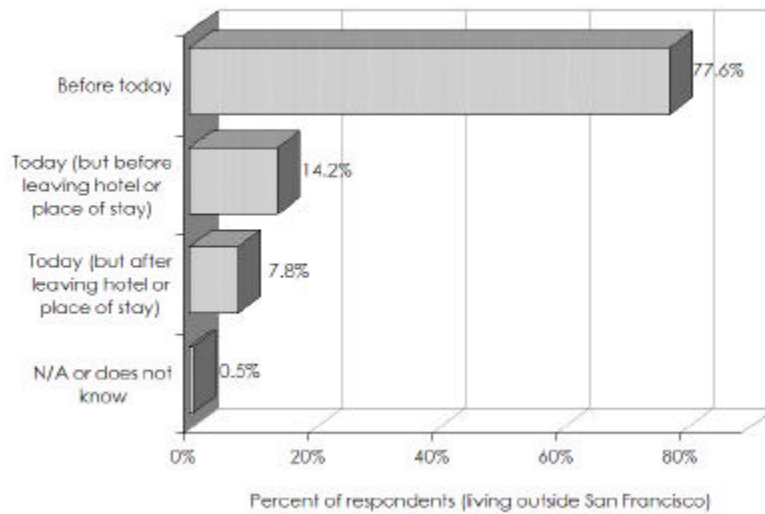
Base: 784 completed surveys (Wave 1 = 263, Wave 2 = 259 and Wave 3 = 262)

XXIX. Planning of Fisherman's Wharf Visit

One of the goals of this survey is to develop an understanding of when visitors make the decision to visit Fisherman's Wharf. This research shows that visitation to the Wharf is planned largely in advance. In total, over 77 percent of visitors said that they had planned their visit at some point before the day they were surveyed. Only about 22 percent of survey respondents made the decision to visit the Wharf on that same day.

Question 23: When was your decision made to visit the Wharf?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Before today	73.8%	86.5%	72.5%
Today (but before left hotel or place of stay)	14.4%	8.9%	19.1%
Today (but after left hotel or place of stay)	11.4%	3.5%	8.4%
N/A or does not know	0.4%	1.2%	0.0%

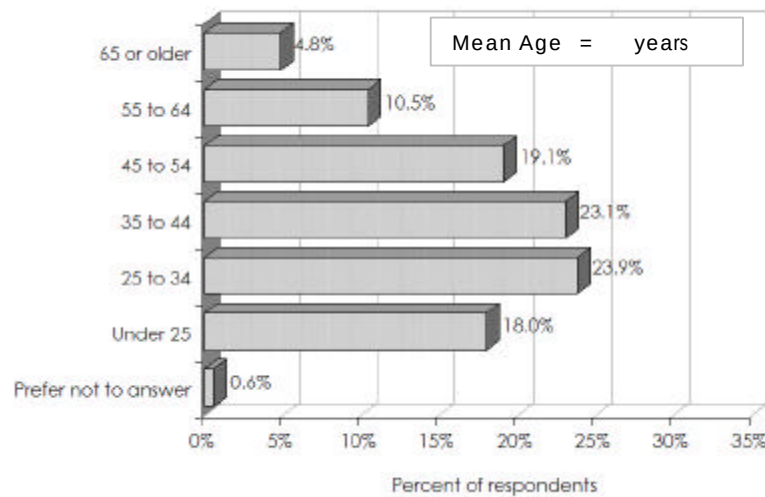
Base: 784 completed surveys (Wave 1 = 263, Wave 2 = 259 and Wave 3 = 262)

XXX. Age

Fisherman's Wharf appears to attract a younger visitor set, with 42 percent being under 35 years of age. The average age of survey respondents is 39.4 years old; in comparison, the average age of San Francisco hotel guests is 46.

Question 24: What is your age?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
65 or older	4.7%	5.4%	4.3%
55 to 64	9.8%	10.2%	11.4%
45 to 54	18.7%	18.7%	20.1%
35 to 44	17.7%	22.1%	29.8%
25 to 34	29.4%	20.7%	21.1%
Under 25	19.0%	22.1%	13.0%
Prefer not to answer	0.6%	0.7%	0.3%
MEAN			

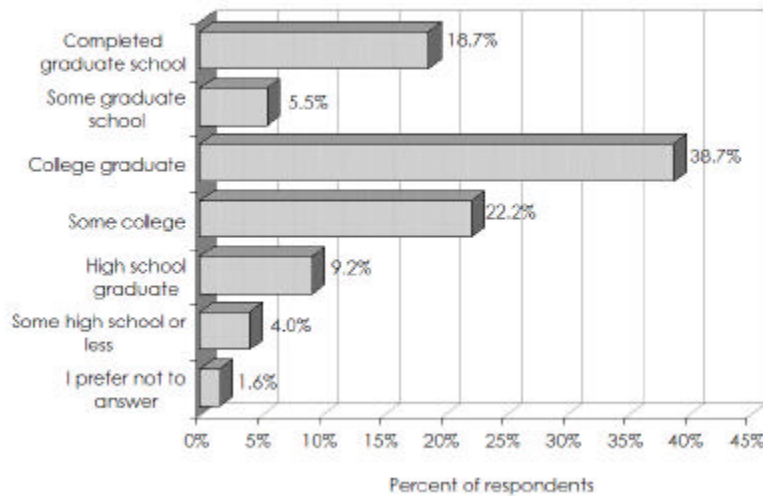
Base: 909 completed surveys (Wave 1 = 316, Wave 2 = 294 and Wave 3 = 299)

XXXI. Formal Education

Wharf visitors are a highly educated group, with nearly 63 percent having at least graduated from college. By way of comparison, according to the U.S. Bureau of the Census, approximately 27 percent of American adults 25 or older have attained a college degree.

Question 25: What is your highest level of formal education?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Completed graduate school	19.2%	15.7%	21.1%
Some graduate school	4.1%	5.0%	7.4%
College graduate	40.7%	38.8%	36.6%
Some college	19.9%	24.7%	22.1%
High school graduate	9.5%	9.4%	8.7%
Some high school or less	4.7%	4.3%	3.0%
I prefer not to answer	1.9%	2.0%	1.0%

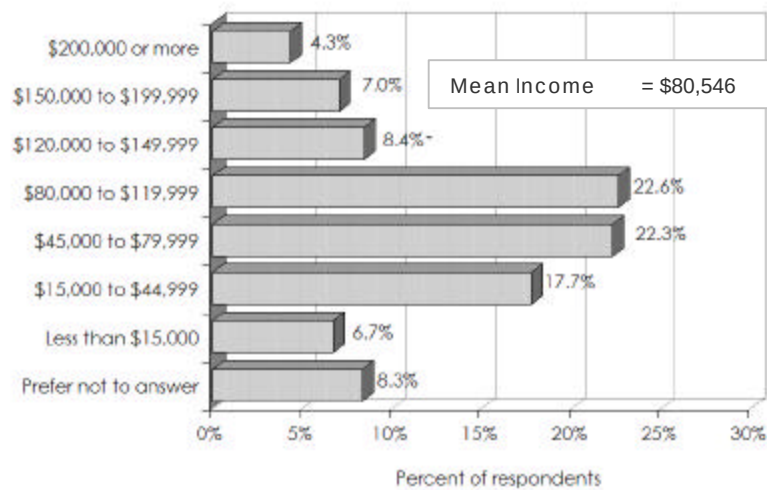
Base: 914 completed surveys (Wave 1 = 317, Wave 2 = 299 and Wave 3 = 298)

XXXII. Annual Household Income

Fisherman's Wharf visitors appear to be fairly affluent. The annual household income of respondents averaged \$82,111 over the year. In the third wave of research, the annual household income of respondents reached \$87,338, significantly higher than in the first two waves.

Question 26: Which of the following best describes the combined annual income of all members of your household?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
\$200,000 or more	4.3%	5.6%	3.6%
\$150,000 to \$199,999	7.0%	8.1%	2.6%
\$120,000 to \$149,999	8.4%	10.0%	8.3%
\$80,000 to \$119,999	22.6%	18.4%	24.4%
\$45,000 to \$79,999	22.3%	21.6%	22.4%
\$15,000 to \$44,999	17.7%	19.1%	17.8%
Less than \$15,000	6.7%	7.8%	5.6%
Prefer not to answer	8.3%	6.6%	12.5%

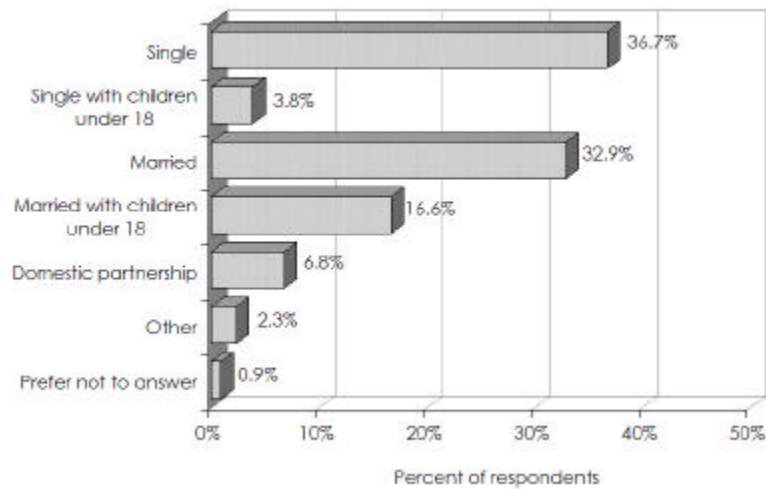
Base: 924 completed surveys (Wave 1 = 320, Wave 2 = 303 and Wave 3 = 300)

XXXIII. Current Marital Status

Approximately half (49.4%) of survey respondents are married, while 40.5 percent are single. About 20 percent have children under age 18. Summer visitors are more likely to be married and have children under age 18.

Question 27: Which of the following best describes your current marital status?

Detail by Survey Wave



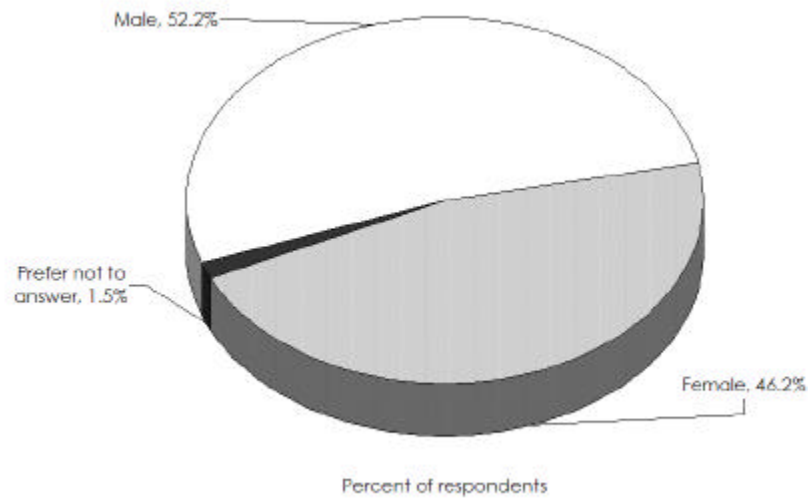
	Wave 1	Wave 2	Wave 3
Single	36.7%	40.5%	34.9%
Single with children under 18	3.8%	4.1%	4.4%
Married	32.9%	33.2%	31.2%
Married with children under 18	16.6%	14.2%	21.5%
Domestic partnership	6.8%	6.3%	5.0%
Other	2.3%	0.9%	1.7%
Prefer not to answer	0.9%	0.6%	1.3%

Base: 913 completed surveys (Wave 1 = 316, Wave 2 = 298 and Wave 3 = 299)

XXXIV. Gender

Fisherman's Wharf visitors are fairly evenly split by gender, with a slight tilt toward male visitors.

Question 28: What is your gender?



Detail by Survey Wave

	Wave 1	Wave 2	Wave 3
Male	51.4%	48.3%	57.0%
Female	47.6%	49.0%	41.9%
Prefer not to answer	0.9%	2.6%	1.0%

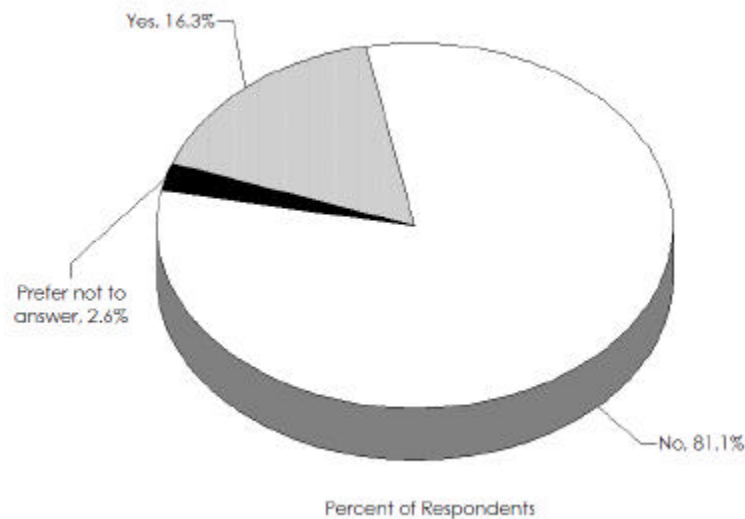
Base: 917 completed surveys (Wave 1 = 317, Wave 2 = 302 and Wave 3 = 298)

XXXV. Latino – Hispanic Descent

The survey used a standard set of questions to ask respondents to describe their ethnic identity. First, they were asked whether they consider themselves to be of Latino or Hispanic descent, then they were asked which best describes their ethnicity. This question set is used as Latino/Hispanic persons can be of diverse ethnic backgrounds, and might also consider themselves to be in one of the groups detailed in the next question (ethnicity). Similar across all research waves, 16.3 percent of survey respondents consider themselves to be of Latino or Hispanic descent.

Question 29: Do you consider yourself to be of Latino/Hispanic descent?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Yes	16.1%	16.9%	15.8%
No	82.3%	79.1%	81.9%
Prefer not to answer	1.6%	4.0%	2.3%

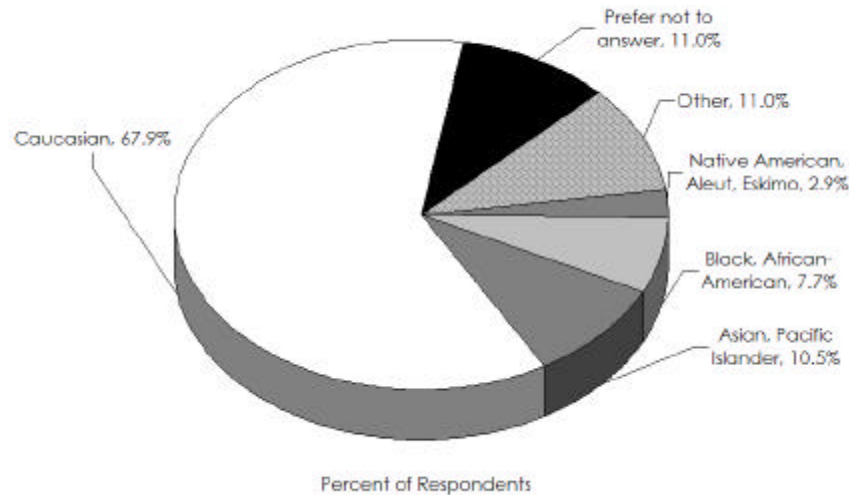
Base: 916 completed surveys (Wave 1 = 316, Wave 2 = 302 and Wave 3 = 298)

XXXVI. Ethnicity

The ethnic profile of Wharf visitors collected in this research shows that a majority (67.9%) of respondents self-identify as Caucasian. Asian-Pacific Islanders accounted for 10.5 percent of surveys collected and Black/African-Americans 7.7 percent. 2.9 percent of surveyed individuals identified as Native American, Aleut, or Eskimo, while 11.0 percent said they were of an “other” ethnicity.

Question 30: Which best describes your ethnicity?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Caucasian	63.3%	68.5%	72.2%
Asian, Pacific Islander	9.7%	12.6%	9.2%
Black, African-American	7.7%	6.3%	9.2%
Native American, Aleut, Eskimo	3.0%	2.4%	3.2%
Other	16.3%	10.1%	6.3%
Prefer not to answer	16.3%	10.1%	6.3%

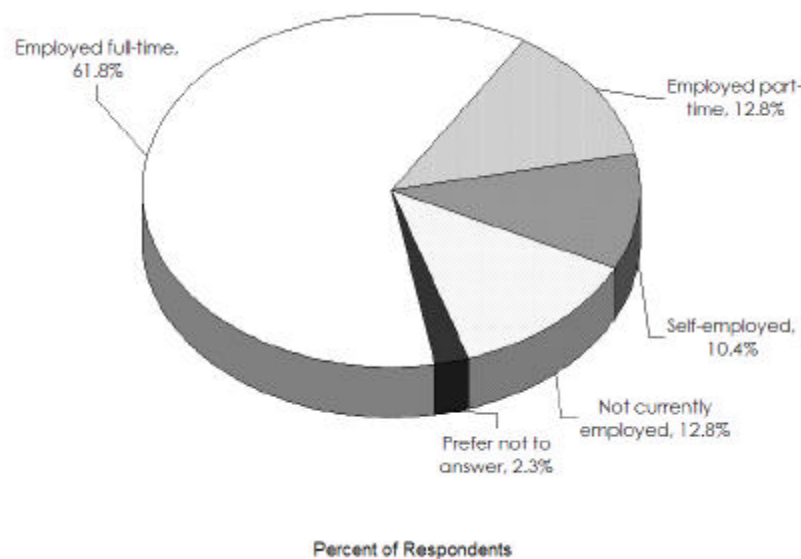
Base: 870 completed surveys (Wave 1 = 300, Wave 2 = 298 and Wave 3 = 284)

XXXVII. Employment Status

Fisherman's Wharf visitors are largely employed. Over 60 percent of respondents said that they were employed full-time. About 13 percent are working part-time, and 10 percent are self-employed.

Question 31: Which of the following best describes your current employment status?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Employed full-time	58.9%	58.9%	67.8%
Employed part-time	13.0%	15.6%	9.7%
Self-employed	11.4%	10.9%	8.7%
Not currently employed	14.6%	11.3%	12.4%
Prefer not to answer	2.2%	3.3%	1.3%

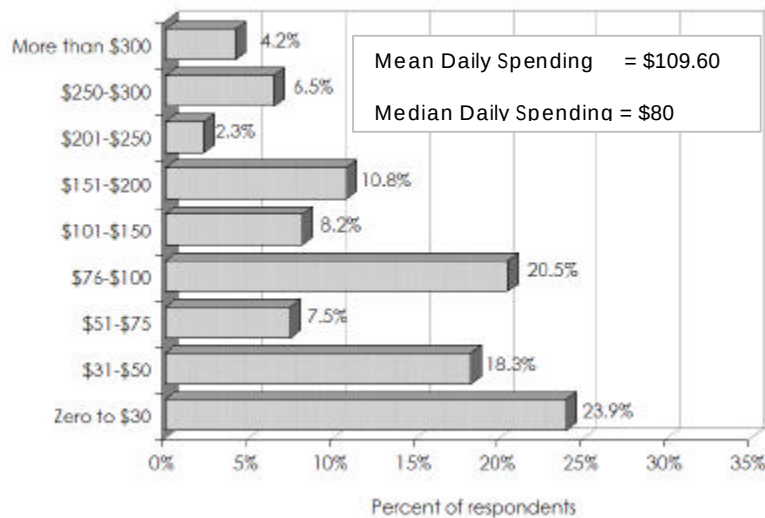
Base: 916 completed surveys (Wave 1 = 316, Wave 2 = 302 and Wave 3 = 298)

XXXVIII. Spending at Fisherman's Wharf

Respondents were asked to estimate the amount (in total) that they would spend while at the Wharf on the day they were surveyed. The average Wharf visitor reports spending \$109.60 during their visit. This research also shows that summer visitors spend (or intend to spend) more than those in the spring and fall shoulder seasons. The average summer visitor estimated that they spent (or would spend) \$124.33 during the day, compared to the \$102.64 and \$103.70 estimated by spring and fall visitors, respectively. The median daily spending for all surveys collected in this project was \$80.

Question 32: How much in total did you (or will you) spend while at Fisherman's Wharf today?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
More than \$300	3.3%	5.4%	4.1%
\$250-\$300	4.9%	6.6%	8.2%
\$201-\$250	1.6%	2.3%	3.0%
\$151-\$200	12.5%	12.4%	7.5%
\$101-\$150	8.2%	8.5%	7.8%
\$76-\$100	20.7%	21.7%	19.0%
\$51-\$75	6.2%	7.4%	9.0%
\$31-\$50	17.7%	22.5%	14.9%
Zero to \$30	26.6%	15.1%	29.5%
Mean spending	\$102.64	\$123.93	\$103.70
Median spending	\$75.00	\$100.00	\$70.00

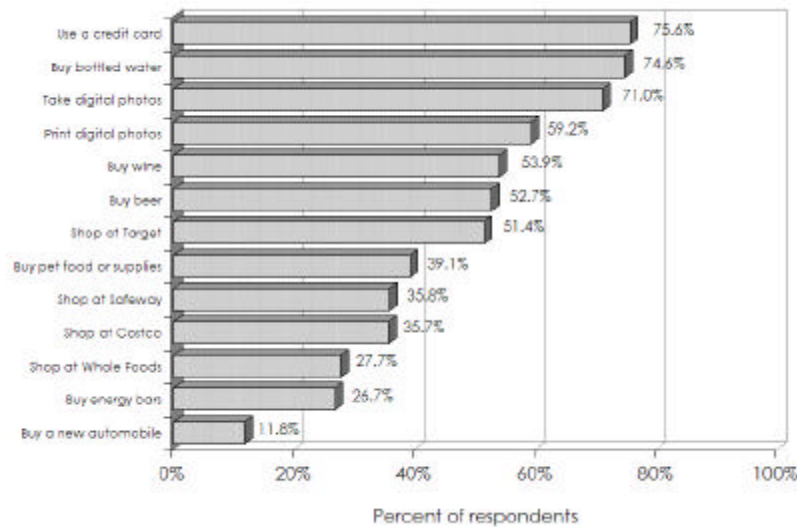
Base: 831 completed surveys (Wave 1 = 305, Wave 2 = 258 and Wave 3 = 268)

XXXIX. Likely Activities in the Next 6 Months

A question was added to the second and third waves of the survey that asked respondents if they were likely to purchase several types of items and/or activities in the next six months. The table below shows the results. Those most frequently mentioned were “Use a credit card” (75.6%), “Buy bottled water” (74.6%) and “Take digital photos.”

Question 33: In the next 6 months, which of the following are you likely to do?

Detail by Survey Wave



	Wave 1	Wave 2	Wave 3
Use a credit card	-	79.9%	71.3%
Buy bottled water	-	81.8%	67.3%
Take digital photos	-	74.6%	67.3%
Print digital photos	-	62.4%	56.0%
Buy wine	-	52.1%	55.7%
Buy beer	-	55.1%	50.3%
Shop at Target	-	54.8%	48.0%
Buy pet food or supplies	-	42.9%	35.3%
Shop at Safeway	-	40.3%	31.3%
Shop at Costco	-	41.3%	30.0%
Shop at Whole Foods	-	27.7%	27.7%
Buy energy bars	-	29.0%	24.3%
Buy a new automobile	-	10.6%	13.0%
Use a credit card	-	79.9%	71.3%

Base: 603 completed surveys (Wave 1 = NA , Wave 2 = 303 and Wave 3 = 300)

XL. Appendix I (Sample Collection Specifics)

The following chart shows the sample size goals of this project compared with the actual results.

	Goal	Actual	Wave 1	Wave 2	Wave 3
Total Surveys	900	923	320	303	300
Weekend	60.0%	60.0%	61.3%	59.9%	58.7%
Weekday	40.0%	40.0%	38.8%	40.1%	41.3%
PIER 45	30.0%	30.3%	30.3%	30.5%	30.0%
PIER 43	15.0%	14.1%	15.3%	12.6%	14.3%
PIER 39	20.0%	20.6%	19.7%	22.2%	20.0%
Hyde Street Cable Car Turnaround	20.0%	20.1%	20.6%	19.5%	20.0%
Taylor Street Cable Car Turnaround	15.0%	15.0%	14.1%	15.2%	15.7%
Morning	15.0%	15.4%	15.3%	15.0%	16.0%
Afternoon	55.0%	54.1%	54.7%	53.2%	54.3%
Evening	30.0%	30.5%	30.0%	31.9%	29.7%

XLI. Appendix II (Attribute Rating Detail)

Question 17 asked respondents to evaluate eleven different aspects of the Wharf. An overview of this question's findings was presented earlier (page 30, Rating of Fisherman's Wharf Attributes.) Detail for each attribute is provided in this appendix as a reference.

Impression of Seating	WAVE 1	WAVE 2	WAVE 3	TOTAL	Impression of Walkability	WAVE 1	WAVE 2	WAVE 3	TOTAL
Very Poor	4.2%	3.6%	8.6%	5.4%	Very Poor	0.4%	1.6%	0.8%	0.9%
Poor	11.1%	9.1%	12.8%	11.1%	Poor	1.9%	3.7%	2.0%	2.5%
Neutral	24.0%	26.5%	24.5%	25.0%	Neutral	11.2%	15.4%	11.8%	12.8%
Good	43.1%	37.9%	37.0%	39.3%	Good	43.2%	45.1%	36.2%	41.5%
Very Good	17.6%	22.9%	17.1%	19.1%	Very Good	43.2%	34.1%	49.2%	42.3%
Impression of Cleanliness	WAVE 1	WAVE 2	WAVE 3	TOTAL	Impression of Historic Attributes	WAVE 1	WAVE 2	WAVE 3	TOTAL
Very Poor	0.0%	2.0%	3.5%	1.9%	Very Poor	0.4%	1.2%	2.8%	1.5%
Poor	10.3%	12.3%	15.2%	12.6%	Poor	5.7%	7.3%	6.0%	6.3%
Neutral	20.7%	25.8%	23.0%	23.1%	Neutral	26.8%	37.6%	31.7%	31.9%
Good	53.6%	45.6%	43.2%	47.5%	Good	40.2%	35.5%	34.9%	36.9%
Very Good	15.3%	14.3%	15.2%	14.9%	Very Good	26.8%	18.4%	24.6%	23.4%
Impression of Safety	WAVE 1	WAVE 2	WAVE 3	TOTAL	Impression of Entertainment	WAVE 1	WAVE 2	WAVE 3	TOTAL
Very Poor	1.1%	0.4%	0.8%	0.8%	Very Poor	0.8%	0.4%	2.4%	1.2%
Poor	1.1%	2.0%	3.5%	2.2%	Poor	3.8%	5.4%	6.4%	5.2%
Neutral	11.1%	12.3%	15.2%	12.8%	Neutral	30.7%	26.9%	32.7%	30.1%
Good	55.3%	53.6%	52.7%	53.8%	Good	33.7%	45.5%	34.3%	37.7%
Very Good	31.3%	31.7%	27.7%	30.4%	Very Good	31.0%	21.9%	24.3%	25.9%

Impression of Views	WAVE 1	WAVE 2	WAVE 3	TOTAL	Impression of Dining	WAVE 1	WAVE 2	WAVE 3	TOTAL
Very Poor	0.0%	0.4%	0.8%	0.4%	Very Poor	1.5%	1.6%	0.4%	1.3%
Poor	0.8%	0.4%	1.6%	0.9%	Poor	5.4%	3.2%	2.0%	3.5%
Neutral	5.7%	3.6%	5.1%	4.8%	Neutral	19.2%	23.0%	22.1%	21.4%
Good	21.8%	20.6%	21.0%	21.1%	Good	32.2%	43.1%	38.7%	37.9%
Very Good	71.8%	75.0%	71.6%	72.8%	Very Good	41.8%	29.0%	36.8%	35.9%
Impression of Shopping	WAVE 1	WAVE 2	WAVE 3	TOTAL	Impression of Signage	WAVE 1	WAVE 2	WAVE 3	TOTAL
Very Poor	2.3%	2.4%	1.2%	2.0%	Very Poor	1.5%	1.2%	1.6%	1.4%
Poor	7.7%	5.2%	5.5%	6.1%	Poor	7.3%	3.7%	7.5%	6.3%
Neutral	31.4%	32.9%	29.7%	31.3%	Neutral	31.8%	25.0%	25.1%	27.3%
Good	29.1%	29.8%	32.8%	30.6%	Good	42.9%	52.0%	41.6%	45.3%
Very Good	29.5%	29.8%	30.9%	30.0%	Very Good	16.5%	18.0%	24.3%	19.6%
Impression of Retail Selection	WAVE 1	WAVE 2	WAVE 3	TOTAL					
Very Poor	2.3%	2.4%	2.0%	2.2%					
Poor	7.3%	6.8%	9.0%	7.7%					
Neutral	39.8%	42.8%	39.1%	40.5%					
Good	26.8%	28.0%	27.3%	27.4%					
Very Good	23.8%	20.0%	22.7%	22.2%					

Note: The sample sizes used for these results (completed surveys) are: Total = 771, wave 1 = 262, wave 2 = 252, wave 3 = 256.

XLII. Survey Questionnaires

As mentioned earlier, this project relies on an intercept survey methodology. The questionnaire (English language version) used by the field surveyors follows. In the event that effective communication was not possible with a Spanish speaking or Japanese speaking respondent, the field team used professionally translated self-administered questionnaires. These documents are available upon request.

Fisherman's Wharf Community Benefit District Visitor Survey

1. How did you arrive at Fisherman's Wharf today?

- ☐ Bus ☐ Walked
☐ Street car ☐ Staying at wharf
☐ Private automobile ☐ Cable car
☐ Taxi ☐ Ferry/boat
☐ Tour bus ☐ Other: _____

2. I'm going to ask you about getting to and around Fisherman's Wharf. Please rate each using a scale where:

1 = Very Poor 2 = Poor 3 = Neutral 4 = Good and 5 = Very Good.

NOTE: ASK (A) ONLY IF ARRIVING BY AUTOMOBILE:

a. Cost of parking at Fisherman's Wharf: _____

b. Street signage directing you to and around the Wharf: _____

3. What was your primary reason for visiting Fisherman's Wharf today? (Check only one)

- ☐ Shopping
☐ Sightseeing
☐ Food or dining
☐ No specific reason
☐ To visit a specific attraction
 (If an attraction, which one: _____)

4. How important was "food or dining" in your decision to visit Fisherman's Wharf today? Was it...

- ☐ Not at all important
☐ Of little importance
☐ Important, or
☐ Very important

5. Which dining alternatives did you (or do you plan to) use on your visit to the Wharf today? I'll read you a list of dining alternatives now.

- ☐ Fine dining restaurant
☐ Casual dining restaurant
☐ Street vendor or seafood stand
☐ Fast food
☐ Food you brought with you
☐ I did not (or will not) eat at the Wharf today

Date: ____ / ____ / ____ TIME: ____ AM / PM

Location code: _____ Surveyor: _____

- ☐ PIER 39 ☐ Aquarium of the Bay
☐ The Wax Museum ☐ Alcatraz
☐ U.S.S. Pampanito ☐ Bay cruise
☐ Amusing America ☐ Sea Lions
☐ Hyde Street Pier ☐ Ghirardelli Square
☐ Maritime Museum ☐ The Anchorage
☐ The Cannery ☐ Ripley's Believe it or Not
☐ Other _____

7. Where do you currently live?

- ☐ San Francisco (Skip to question 24)
☐ San Francisco Bay Area (outside SF)
☐ Other USA
☐ Foreign residence: (Country) _____

IF USA: What is your zip code? _____

8. Is this your first visit to Fisherman's Wharf?

- ☐ Yes ☐ No

IF NO: How many times have you been to Fisherman's Wharf before today? _____

9. I'm going to ask you a few more questions about the trip you're currently taking. Which best describes the purpose of your trip?

- ☐ Vacation or leisure
☐ Business or a convention

10. Where are you currently staying?

- ☐ Hotel, motel or inn (in San Francisco)
☐ Private residence (in San Francisco)
☐ Hotel, motel or inn (outside San Francisco)
☐ Private residence (outside San Francisco)
☐ Other

ASK ONLY IF STAYING IN A HOTEL

11. How did you make your hotel reservations?

- ☐ Internet (hotel website)
- ☐ Internet (3rd party site, Expedia, Travelocity, etc.)
- ☐ Telephone reservation system
- ☐ Travel agent
- ☐ Walk-in to hotel
- ☐ Other: _____

12. Were you aware that Fisherman's Wharf has an official website?

- ☐ Yes ☐ No

13. If the official Fisherman's Wharf website offered travel packages (for example a stay at a Wharf hotel and tickets to attractions or events), in general, how interesting would this be to you? Would you be...

- ☐ Not at all interested
- ☐ A little interested
- ☐ Interested
- ☐ Very interested

14. How many people are in your group today? _____

15. Do you have any children under 18 years of age with you today?

- ☐ Yes ☐ No

16. How long did you (or will you) stay at Fisherman's Wharf today? (Verbatim response)

17. Next, I'm going to ask you about your general impression of Fisherman's Wharf. Please use this scale to rate each aspect of the Fisherman's Wharf:

1 = Very Poor 2 = Poor 3 = Neutral 4 = Good and 5 = Very Good

_____ Outdoor seating	_____ Dining
_____ Overall cleanliness	_____ Signage
_____ Safety	_____ Walkability
_____ Views	_____ Historic attributes
_____ Shopping	_____ Entertainment
_____ Selection of retail stores	

18. When you think about Fisherman's Wharf, what are the images or impressions that first come to mind?

Anything else? _____

19. What do you like most about Fisherman's Wharf? (Verbatim response)

Anything else? _____

20. What do you dislike most about Fisherman's Wharf? (Verbatim response)

Anything else? _____

21. How likely would you be to visit Fisherman's Wharf again? Would you be...

- ☐ Very likely
- ☐ Likely
- ☐ Neither likely nor unlikely
- ☐ Unlikely
- ☐ Very unlikely
- ☐ NA/does not know

22. Thinking about all aspects of your visit to Fisherman's Wharf today, how satisfied are you with your visit? Would you say that you are....

- ☐ Extremely Satisfied
- ☐ Satisfied
- ☐ Neither satisfied nor unsatisfied
- ☐ Unsatisfied
- ☐ Extremely unsatisfied
- ☐ NA/does not know

23. When was your decision made to visit the Wharf? Was it...

- ☐ Before today
- ☐ Today (but before I left my hotel or place of stay) or
- ☐ Today (but after I left my hotel or place of stay)
- ☐ NA/does not know

Please take a moment and answer the following questions:

24. What is your age? (Select one)

- ☐ Under 25
- ☐ 25 to 34
- ☐ 35 to 44
- ☐ 45 to 54
- ☐ 55 to 64
- ☐ 65 or older
- ☐ I prefer not to answer

25. What is your highest level of formal education? (Select one)

- ☐ Some high school or less
- ☐ High school graduate
- ☐ Some college
- ☐ College graduate
- ☐ Some graduate school
- ☐ Completed graduate school
- ☐ I prefer not to answer

26. Which of the following best describes the combined annual income of all members of your household? (Select one)

- ☐ Less than \$15,000
- ☐ \$15,000 to \$44,999
- ☐ \$45,000 to \$79,999
- ☐ \$80,000 to \$119,999
- ☐ \$120,000 to \$149,999
- ☐ \$150,000 to \$199,999
- ☐ \$200,000 or more
- ☐ I prefer not to answer

27. Which of the following best describes your current marital status? (Select one)

- ☐ Single
- ☐ Single with children under 18
- ☐ Married
- ☐ Married with children under 18
- ☐ Domestic partnership
- ☐ Other
- ☐ I prefer not to answer

28. What is your gender? (Select one)

- ☐ Male
- ☐ Female
- ☐ I prefer not to answer

29. Do you consider yourself to be of Latino/Hispanic descent? (Select one)

- ☐ Yes
- ☐ No
- ☐ I prefer not to answer

30. Which best describes your ethnicity? (Select one)

- ☐ Caucasian
- ☐ Black, African-American
- ☐ Asian, Pacific Islander
- ☐ Native American, Aleut, Eskimo
- ☐ Other
- ☐ I prefer not to answer

31. Which of the following best describes your current employment status? (Select one)

- ☐ Employed full-time
- ☐ Employed part-time
- ☐ Self-employed
- ☐ Not currently employed
- ☐ I prefer not to answer

32. How much in total did you (or will you) spend while at Fisherman's Wharf today?

(Please do not include money spent on transportation to the Wharf or on your hotel room if staying at the Wharf.)

\$_____ Total spending at Fisherman's Wharf

33. In the next 6 months, which of the following are you likely to do? (Please indicate YES or NO for each)

Shop at Safeway	☐ Yes	☐ No
Shop at Target	☐ Yes	☐ No
Shop at Costco	☐ Yes	☐ No
Shop at Whole Foods	☐ Yes	☐ No
Visit a Starbuck's	☐ Yes	☐ No
Buy pet food or supplies	☐ Yes	☐ No
Buy wine	☐ Yes	☐ No
Buy beer	☐ Yes	☐ No
Buy energy bars	☐ Yes	☐ No
Buy bottled water	☐ Yes	☐ No
Buy a new automobile	☐ Yes	☐ No
Use a credit card	☐ Yes	☐ No
Take digital photographs	☐ Yes	☐ No

Print digital photographs ☐ Yes ☐ No